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Digitizing Workflows for SMEs

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February 2021



This toolkit was prepared by Khalil Azar for SPARK as a part of the Iraqi SMEs COVID-19 Response under Jobs & Perspectives Programme.

The Programme is funded by the Dutch Ministry of Foreign Affairs, and aims to accelerate economic development in Iraq.

SPARK provides access to higher education and supports entrepreneurship development in fragile states so that young, ambitious people can lead their societies into stability and prosperity.

SPARK provides a variety of full-service business and entrepreneurship programmes in Europe, the Middle East and Africa. We believe that sustainable, economic growth is essential for the alleviation of poverty. By offering private-sector development services to young people in conflict-affected regions, we believe that the potential for further conflict is significantly reduced.



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Overview

The impact of the coronavirus (COVID-19) has hit all businesses around the world. However, some businesses have been affected by the virus much more than others. Safety measures forced by governments such as social distancing or complete lockdowns forced people to stay home making businesses difficult to sustain; especially those which are customer facing. Business owners are still navigating a broad range of ways to sustain their businesses during, and after the pandemic especially in countries where governmental support Programmes are not in place.



Why Digitize your Business?

Most industries and businesses that survived the stale economy adopted digitization and the Post Covid-19 outlook presents digitization of businesses as the new normal. The Covid-19 lockdown didn't just influence businesses, but has also led to behavioral changes among consumers. For example; the whole world witnessed a surge in online delivery services, as people are trying to limit their trips outside their homes. Sometimes when a situation is too chaotic, opportunities arise to mitigate and serve. To help you understand the

implications of COVID-19 on your business and how to best position and digitize your business to be resilient in the future, we have created this toolkit based on the latest thinking and insights from global business professionals.

Digitizing business isn't just a response to the Covid-19 pandemic, but to any situation which arises in the future hindering growth. Embracing technology is both time and cost efficient; as well as innovative - because you're catering to customers' needs - and immune to collateral damage which might inhibit your business' growth.



What will you get from digitizing your business?

1. **No geographical limits**

Your service gets nationwide if not global reach

Your strategy could take you beyond your physical boundaries, with local obstacles and markets being trespassed towards markets that are simpler to penetrate. This release would allow you to grow from an SME to a well established larger business.

2. **Added value to your customers**

With continuous improvements of your products and services, your customers are provided with better levels of service. This will reflect directly on your sales and brand image, with a needed effort that is much less than by using traditional means.

3. **Better market reach and increased sales**

Your sales could now be more

targeted, being able to find and sell to individuals that are more interested in your goods and services. Your business will outperform local market competition that would be blind in the face of a well digitised SME.

4. **Social Engagement**

Reaching your user base via a one-to-one correspondence allows you to engage with your community on a much personal basis, further strengthening your social positioning and ultimately, brand image and sales.



The Power of Apps

You might have been using applications your whole lives or you might have been used to doing things manually, the power of proper long term use of applications in business lies primarily in making easier the ability for the business to evolve and develop. Being able to track every aspect of your business, analyse it, and change it according to market / consumer forces is extremely powerful. Imagine being agile enough to respond to a change in your environment on the same day, how much business can you get? Infinite, you would be a first responder and the first to reap the harvest of the change (that can be deadly for non-agile businesses)

As humans, we have limited time, are prone to errors and have limited capacity and interest in doing repetitive tasks. Applications allow you to look at the bigger picture, by automating repetitive tasks, calculations, providing insights over the long term

and giving you instant access to information. The more automation you can introduce in your business, the more you are freed up to work on strategy, innovation, and progress. The more you are freed to do that, the easier it is for you to change and evolve.



How to use this toolkit

Even though the bulk of this toolkit refers to applications that allow you to move your organisation into the digital domain, its purpose is to aid you in making your organisation more resilient and sustainable. Agility and strategy are key components in the digitisation processes and without a forward-looking and realistic digital strategy, all tools and applications would fail to achieve your goals. This toolkit will cover three main areas in your business; digitizing your office, digitizing your business, and collaborating with others. In addition to a final chapter which will help you put all components together in one place.



I- Digitizing your Workflow

Introducing technology and tools into your work environment and with your team can be daunting, but doesn't have to be. When identifying the advantages of setting up digitally, it would be easier to implement these solutions with your team, especially if you have a shared vision in place.

These solutions give you the agility and flexibility to sustain in today's challenging and competitive context.

Benefits of Going Paperless

Digitizing your office and going from analog to digital comes with endless advantages, from saving resources to boosting security. With digitization, you will be able to integrate business systems and solutions, improve accessibility and productivity, and save on time and cost.

Oh, and a list of what paperless entails:

- Saves on finances
- Faster communication
- Easy saving and backup
- More secure
- Better organisation
- More environmentally friendly



What Does a Remote Office Look Like?

The culture in any business that has gone digital, is that of continuous optimisation, improved communication clarity, and deep insight for everyone involved in the operation. The process of digitizing a workflow is not merely about moving into areas where remote collaboration is possible as it is a change in mindset in how work gets done.

Digital company culture comprises of one or more of the following attributes:

- Team collaboration and continuous improvement.
- Easy exchange of information
- Task automation
- Straightforward auditing trails.

What's the first step in creating a remote office?

Moving into remote work comes with difficulties that can be overcome with a simple set of operating procedures. Most companies have needed to move directly into a remote setting, under this context, we have created the below checklist to allow for continuing operations remotely while setting up a digital workflow. This step will also show all stakeholders in your SME that digitisation is extremely necessary to continue and improve. These are the first tools that this toolkit provides, remote digital working checklists covering:

- Environment
- Time Management
- Rules of engagement
- Remote working tips
- Digital meeting etiquette

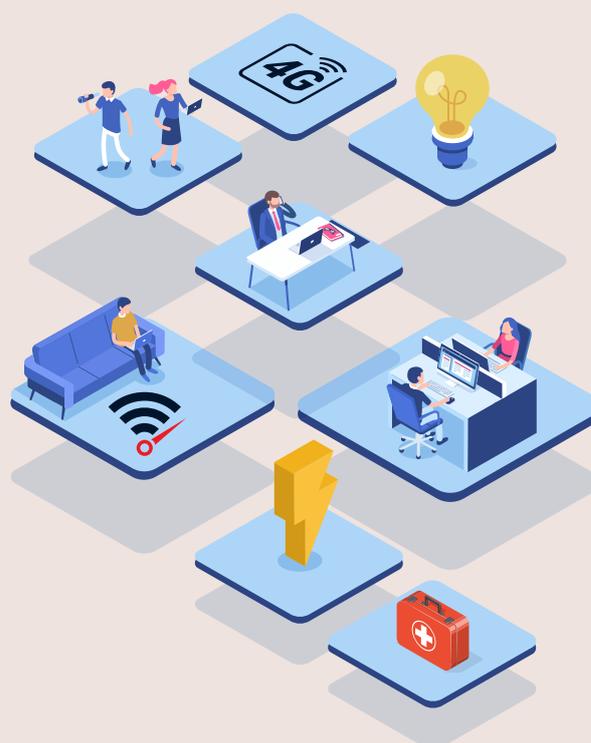
Remote Digital Working Checklist

This is a simple checklist to go over once a week to make sure that you're all set up for work. When all items are covered, there is less of a chance for mistakes to happen, and haphazard events will not appear as resulting from irresponsibility.

Digital Environment Checklist

- My workspace allows me to work in a comfortable fashion, with a good desk, and comfortable seating.
- I have a proper internet connection, with the maximum available speed / reliability. I also have a backup internet connection in case the main one has faults. (4G tethering backup might be an option depending on your location)
- I have proper power for my workspace, with backup power in case of power failure. These can be in the form of backup batteries, a backup generator, or multiple power suppliers.

- My laptop and phone batteries have a good life span in case I was cut off from main power.
- My workspace is tidy, and everything belongs in a particular place. A cluttered workspace, as trivial as this statement is, prevents you from properly going into a creativity / concentration flow.
- I have first kit aids available, and I have properly scheduled tasks that I need to be done in the workspace around me.
- My workspace is free from pollution, whether in the form of bright lights, loud sounds, bad odors.



Time Management Checklist

- My time planning for the day / week is reasonable and is well written out. Whether it is via an excel sheet or advance time management software, planning allows for proper organisation of efforts throughout the day.
- My breaks are well communicated with my team, and I make sure to take relief in regular intervals to decrease physical and mental strain.
- My deliverables are well communicated, achievable and drive me to work toward them.
- I don't isolate myself from communicating with my team, with regular catch ups and raising a red flag whenever something blocks my deliverables.
- I am happy that my workload and targets have been agreed and are achievable

Rules of Engagement for Remote Work Checklist

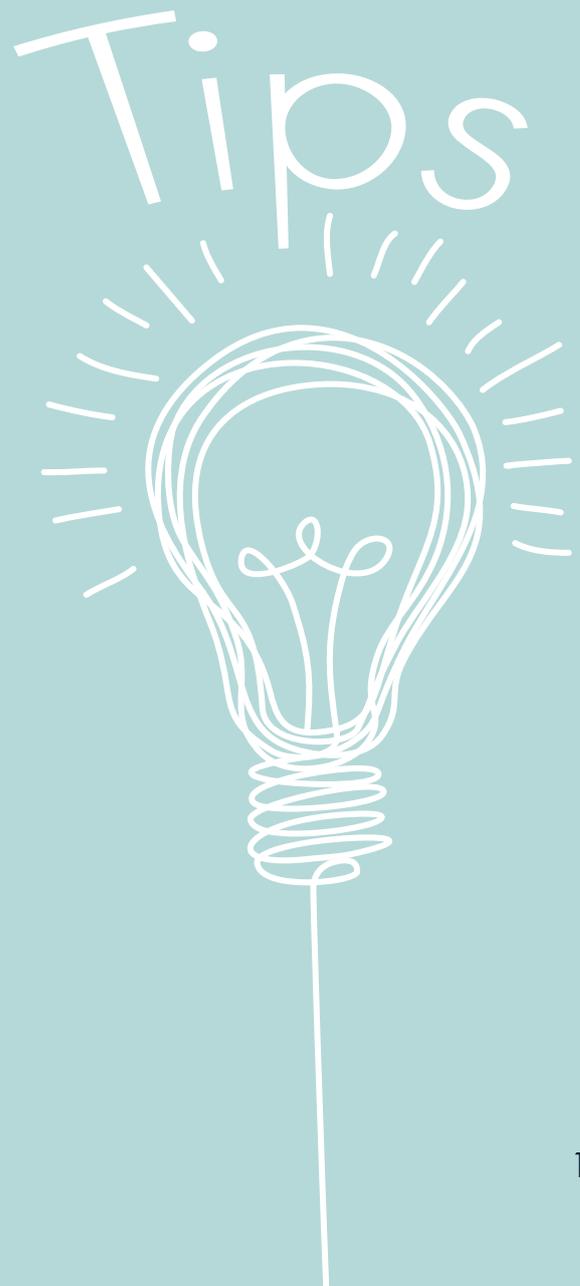
- Schedule meetings for anything that might take more than fifteen minutes - include all meeting attendees, google hangouts link in the invitation. Send invitation using email.
- Have an agenda in the meeting before the meeting happens and have meeting minutes taken during the meeting, saving those for archiving and for referring back to.
- Include action items in the meeting minutes, with clear responsibilities and agreed on routes of action.
- Have quick standup meetings with your collaborators on a daily basis, a green / red status update on the projects you are working on.
- Be available throughout the day, with agreed clock-in and clock-out times between you and your team members, as well as a predefined time for lunch..

Remote Working Tips

- Invest in the best internet connection you could get your hands on - and make sure it works well. Just as you would invest in a good car to get you to the office or smelling and looking good before starting your day, having a good functionally internet connection is essential.
- Clock in on time - just like you do when you're going to the office.
- Take microbreaks - go to the window - give yourself five minutes.
- Clock out on time - don't do chores midday, that's the time that you would end your day, don't extend it. Don't watch movies in the middle of the day or series or whatnot, that will break the focus.
- Two bookends for the day. Take a walk in the evening or in the morning. Bike ride, etc..
- Make sure you log time on your tasks throughout the day, that will help you be better organised and will give visibility

to your team members and managers.

- Be creative in your use of tools, for example for using a digital whiteboard, you may use Miro / Mural as a virtual alternative.



Digital Meeting Etiquette

- Have the camera on as much as you can during meetings (you would never walk into a meeting with a paper bag on your head) (nonverbal communication is important).
- Mute microphone when in meeting and not talking, background noise is annoying.
- Always test equipment before meeting.
- Make sure you have a backup 4G connection. In case of a frail connection - something that happens all too often in the region, make sure you can fall back to a backup connection, you can use the hotspot mode on any iOS / Android device
- Make sure you're comfortable with the video conference tools that are normally used, the basics being Hangouts (including screen sharing) and Skype.
- If the meeting is with a client / contains confidential information make sure to be in an isolated area.

Digital Calendar Literacy

Everyone has moved to their remote offices and are all set up. What about meetings? How can they happen now that there are no more offices in the same space, and how to make them happen without conflicts? As simple as it sounds, digital calendar literacy is extremely important, it would allow everyone in your SME to synchronise meetings internally and with external stakeholders. Office physical presence allowed us to respect each other's spaces in offices, meeting times. When everyone goes digital it is imperative that calendar literacy is present throughout the organisation. Using [Google Calendar](#), make sure that everyone on board understands the tool inside out. By being able to see the schedules of contacts



and customers, booking a calendar entry is always a first step in a meeting. The following is yet another tool in this toolkit, a set of guidelines used to master calendar literacy:

- Only create guest invitations during times guests are not occupied.
- Try to schedule meetings as early on as possible, to give leeway.
- Always include a meeting agenda, shared with the meeting invite..
- Always include meeting notes, written in the meeting itself and approved by the different parties post-meeting.
- When requesting a meeting date change, do that as early as possible as a sign of respect towards guests. Last minute meeting changes / annulations should only happen when faced with an emergency. When requesting meeting changes, make sure you use the «Request meeting change» feature, that way your guests can validate and approve the change.

Internal Communication

In a remote office, there is no longer the luxury of going over to someone's desk and chatting them up, or calling for a meeting with your colleagues or your team members. To make up for that in the digital version of your SME, multiple communication tools can be used, starting with Slack, a powerful channel based chatting agent, Discord, an upgrade on Slack, and Zoom for video conferencing. The following three sections are tools for both formal and ad hoc communication internally.



Slack is a hallmark in channel based messaging, allowing for breakout channels where different topics can be discussed. To create a Slack workspace, simply register that space on the slack website and invite your team mates to it. Once in that space, you can create channels to discuss different topics and have all conversations related to those topics in those channels. A great feature in Slack, one that can take your SME to the next

level in competitive advantage are the different integrations slack has. You can, for example, create a slack bot that informs you every time someone reviews your product online. It can also tell you for example, whenever your team members finished a particular task in the Kanban board above!

Slack lacks in terms of Video / Audio calls, it can be used easily with either Google Hangouts or Zoom to fulfill such a need but if you need a more integrated solution, check the upcoming two tools.



One of the core aspects of digitizing a workflow is setting up a virtual environment where collaboration can thrive, the always-on feeling can persist. One of the best tools available out there for remote collaboration is Discord. It's a communication platform that can be downloaded via discord.com on all platforms:

- Web
- Native
- Mobile

One of its more powerful features is the meeting rooms, always-on

rooms where people can feel omnipresent with their teams, whether thru always on audio or video. Simply jump into one of these rooms to share a virtual space with your teammates. As Discord was primarily designed for gamers, it is particularly powerful at sharing one's screen effortlessly. Whenever collaboration or troubleshooting is needed remotely, team members can share their screens effortlessly.

Furthermore, it is imperative that the status field of one's presence is filled in discord. If you're full-on concentration on a particular task, you can indicate that with a do not disturb status.

zoom

[Zoom](#) has gained extreme popularity as the COVID-19 pandemic spread. It enabled efficient, smooth video calls among multiple parties. As it uses your bandwidth smartly, you experience a fluid experience with little jittering and frame losses.

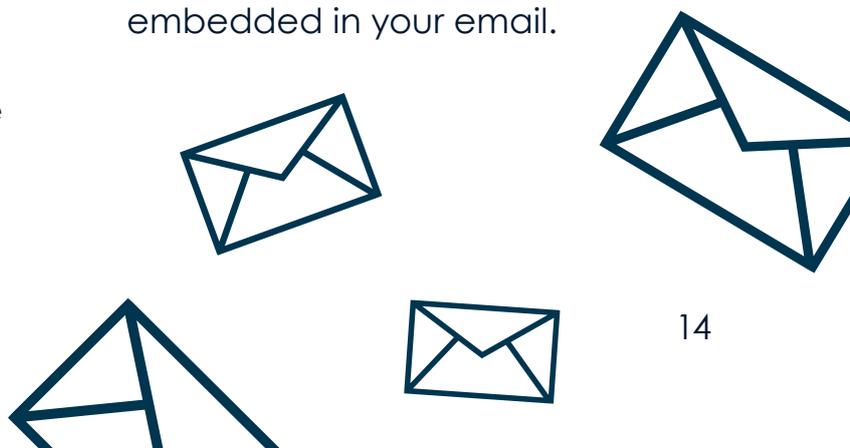
One of the more powerful features of Zoom, especially in the context of fully digitised workflows is breakout rooms. Breakout rooms are sub rooms created out of a channel in Zoom, they allow you to separate the people you are interacting with into different groups and would allow you to merge these groups later. Deeper insight into breakout rooms can be found on: [Managing Breakout Rooms – Zoom Help Center](#)

Email Communication

Even though tools have become available for fluid real time communication, email remains the traditional method to document

agreed upon information. Email culture revolves on the following rules that ensure professional conduct:

- Have a clear ,precise subject that summarises the content and is relevant to it
- Use your domain's email address -you may use email providers like Zoho.com to provide free emails linked to your professional business domain
- Always provide a signature that would allow for reaching out to you properly.
- If the email is being sent to parties that have no formal communication / knowledge of each other ,obfuscate their emails by including them on BCC rather than on CC
- Add the To :and the CC :email addresses after you finish writing the email as not to send the email by mistake.
- Proofread your email always for both tone ,format and grammar.
- Include any files as links hosted externally rather than embedded in your email.



Familiar Tools for Communication

Even if they're not built for use in professional contexts, the following applications can aid in communication at times where access to dedicated apps is not possible. This might be after having to quickly leave your workstation and only have access to your laptop

Telegram and Whatsapp could both be used in professional contexts to make up for the lack of the above tools. A few tips and tricks for their use in an SME is the following.



WhatsApp

- Use Whatsapp for businesses to share information in a professional manner with your audience.
- Use away messages when you are not available in real time to respond: [Using Away Messages](#)
- Set up a product / services catalogue, retrieved from your main catalogue: [About catal](#)
- Set up prices in local currency.
- Specify your shipment / delivery

options.

- Use mentions, and create keep messages to a minimum. If the target of the message is not of importance to most members of the group, send it in private.
- Make sure to use the conference call Whatsapp feature to hold virtual impromptu meetings.

[Group Calling](#)



Telegram

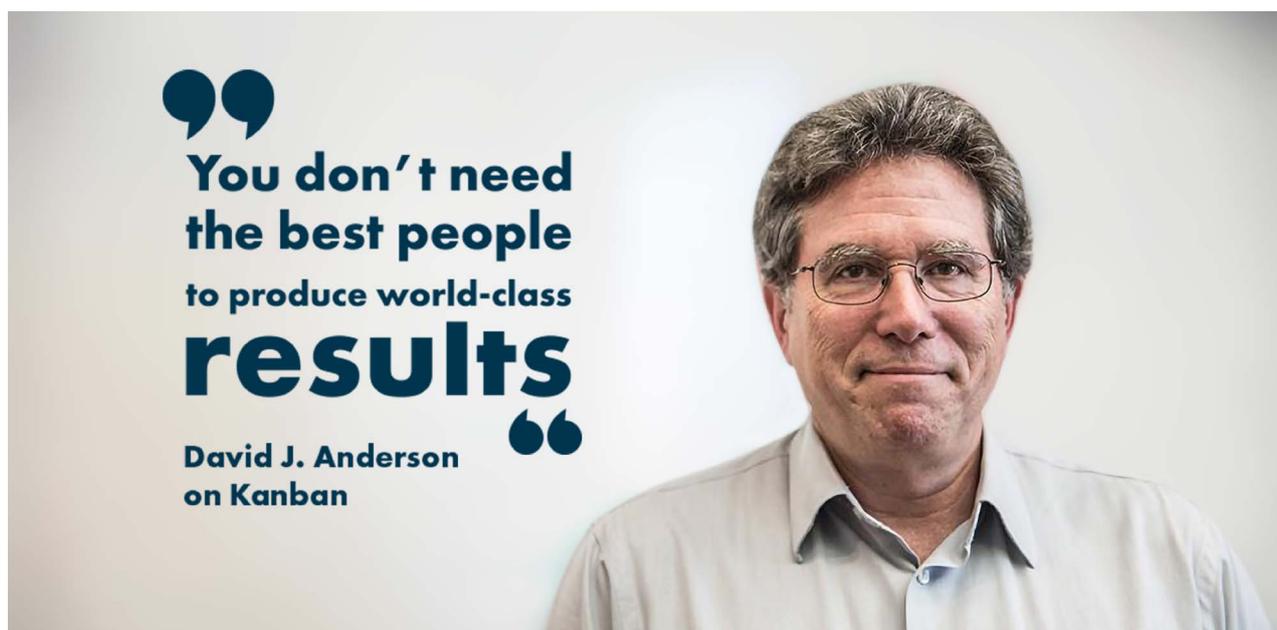
- Using end to end encrypted chat with a click.
- Create ephemeral messages that can automatically self delete after a short period that can be self deleted.
- Use mentions, and create keep messages to a minimum. If the target of the message is not of importance to most members of the group, send it in private.
- Replace channels with groups, create as specific groups as needed.
- Use mentions, and keep group messages to a minimum. If the target of the message is not of importance to most members of the group, send it in private.
- Create a matrix with a pull / push axis per group. Depending on a

member's role, they can silence the group and pull messages from it every x hours or they have to receive messages on that group in realtime. This could aid in the prioritisation of communication processing and could ease being overwhelmed by data.

- Telegram now supports video calls, if privacy is key to operating your business it is one of the most secure communications tools out there to use.
- You can use [Bots](#) to provide smart automatic replies, to give custom information to those asking, and to automate tasks. Bots are powerful but are an advanced feature that requires a bit of development know-how.

Digitizing Remote productivity

Everyone has a remote office, meetings are happening, everyone in the SME is trying to fulfill their jobs remotely but work is slow, low energy, slow results. Is it your employees? Are they slacking off watching TV the whole day? Is there a blame culture with no proper insight on perspective? Optimising remote productivity in a digital fashion replaces managers spending their time monitoring employees in their office with managers optimising processes, having deep insight on bottlenecks increasing transparency. The upcoming tool in this toolkit introduces Kanban, a tool that



optimises production systems that can be extended to all processes in SMEs.

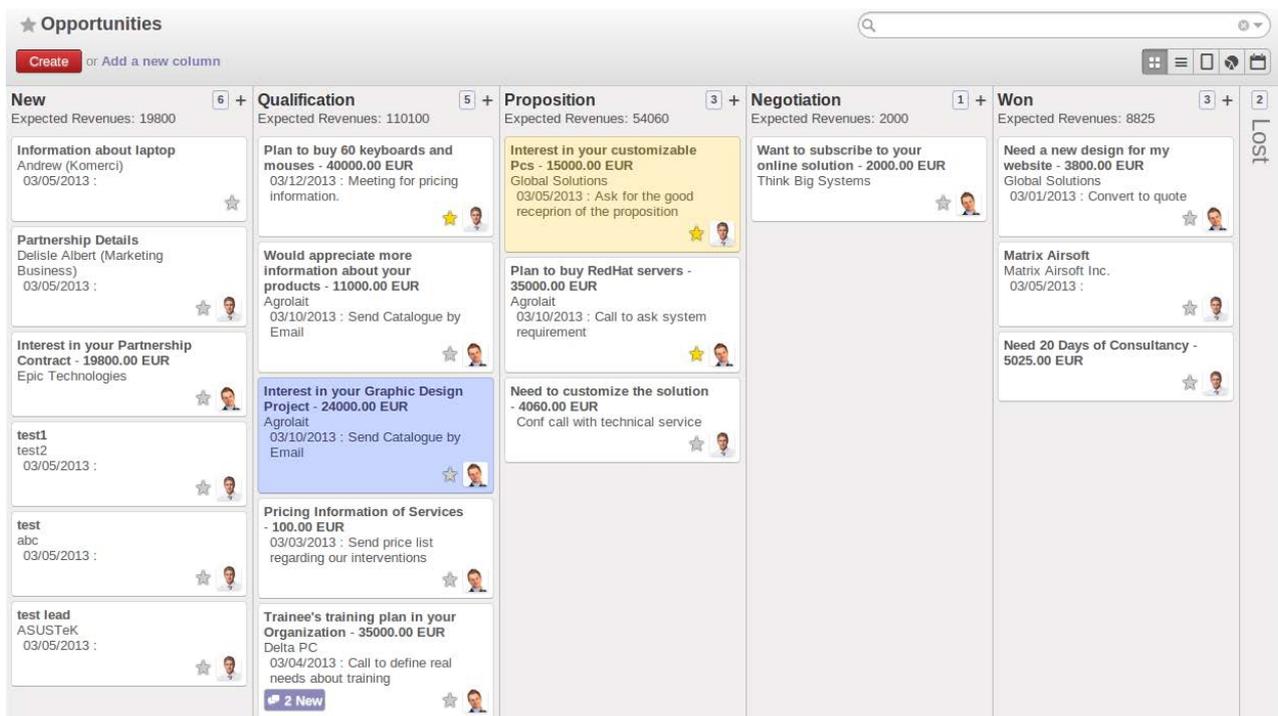
Where to start? Use software, any of the following, to create a board with multiple columns showing the state of every aspect of your manual process. For SMEs, these software is for free.

- [Trello](#)
- [Asana](#)
- [Wekan](#) (Requires setup)
- [Odoo](#)
- [Hygger](#)

This board is called a Kanban board, a board that shows the status of different tasks across different stages of production. The goal of this board is to give you an

overview of the status of everything worked on so that you maximize the velocity, the rate at which tickets are moved from the left side of the board to the right side of the board. Kanban is a mentality, increasing velocity towards a particular goal with continuous improvement. Bottlenecks are then identified as regions with low flow.

The following is a screenshot of a Kanban board from Odoo: notice the different verticals, these are the different stages of your creation process. Moving cards across these verticals at the fastest velocity is at the heart of Kanban:



Kanban board on Odoo. Reference: Odoo.com

The following references dive deeper into Kanban:

[Learn kanban with Jira Software](#)
[Kanban Explained in 10 Minutes](#)
[Quick Kanban Tutorial-2020: Insight into the Concept – Hygger](#)

Digitizing files

A virtual Kanban board, a schedule, meetings with colleagues, we're almost set up for a digital version of your SME. But now what? How to actually get those cards in the Kanban Board floating quickly from left to right? A key component in the digitisation of any business is having digital versions of your documents, and organising and updating these documents in a systematic fashion. [Google Docs](#) along with [Google drive](#) are usually a good starting point for creating your digital assets. They would allow you to switch from paper-based assets to documents, presentations and sheets. So comes our next tools in our toolkit, ways to collaborate, version, and exchange information.

One of the most useful aspects of Google docs is the versioning feature. Once you create and share a document or a sheet on the platform, any one of your colleagues can edit it. The document you've created becomes a living entity, and updating it, iterating on it's improvement becomes a breeze. Using a combination of the "[Suggesting](#)" feature, comments, and collaborative editing, you can create digital live versions of your static Office documents, collaborating on them remotely.

Organising all your documents in a digital space is a key process in digital transformation. For that you can organise your folder structure using Google Drive, making sure to have proper user access permissions for different roles within your SME. [Google Drive](#) can be used on both web and mobile platforms and provides a space to access all documents virtually any time you have an internet connection, or even when you don't.

As our toolkit is specifically targeted towards SMEs it is a common

challenge not to have a proper internet connection. For that, another tool we propose is the “Offline access” feature of google docs. You can enable it by simply selecting File -> make available offline, For a more indepth look at the feature, you can check:[Offline docs on Google Drive](#)

One step up, an upgraded tool over the one used above is [Confluence](#). Confluence is a collaboration tool that brings people, knowledge, and ideas together in a shared workspace, so you can do your best work with the confidence of your entire organization’s expertise behind you. One of the key strengths of Confluence is the high ability to organise digital assets, in a way that is much more organised and holistic than google docs. Even though Confluence is not free, it can be used freely for up to 10 users. It would allow you to store your assets, and organise them in spaces for easy retrieval. It would also allow you quite a sizable list of [most-common document templates](#), a swiss army knife with respect to the tools that we are proposing.

Free alternatives for unplanned ad-hoc file transfers include the following two software. These are useful if you would like to send files to external collaborators on the fly in a secure professional manner.

Dropbox

Dropbox Basic allows you to get to your files from multiple devices, computers, phones and tablets, for free. You get 2GB of storage to backup and sync files on the cloud.



WeTransfer has a beautiful interface, allows for the easy upload and sharing of files, even large ones. You only have to drag and drop the file on their interface, without a sign-in even, and send the file. Wettransfer embraces agility and all the modern ideals associated with it.

II - Working with Others (Virtual Collaboration)

Virtual Collaboration

This area is important to you because most probably the office will be closed and you need to brainstorm with your team members on a new product launching. There are many tools available online both free and paid, to provide people with a virtual space to collaborate, share ideas, and brainstorm. The following three are the sharpest of knives, included in this toolkit to aid you head mind-opening meetings that excel in delivering on their target

1. Miro
2. Mural
3. [Teams White Board](#)

The Miro logo consists of the word "miro" in a bold, lowercase, sans-serif font. The letters are black and are set against a bright yellow rectangular background.

[Miro](#) boards are free digital whiteboards that allow different team members to collaborate virtually. Whether it is ideation, creating user personas, mind mapping, strategy, or otherwise, these processes that were traditionally done in creative offices are now easily turned digital. Miro is free, and in the context of SMEs, would allow you to take that leap of faith into completely-digital ideation and brainstorming.

Miro is a key pillar in digitizing offices, as it removes the need to be in the same physical space for ideation. It's rich features allow for creativity to spur, whether you are working within a team, with business partners, or directly with clients.

The Mural logo features the word "MURAL" in a bold, uppercase, sans-serif font. Each letter is white and is contained within a red square. The squares are arranged in a horizontal row and are slightly offset to the right, creating a staggered effect.

[Mural](#) is a digital workspace for visual collaboration, a more powerful tool than Miro, although carrying a price tag. Mural enables innovative teams to think and collaborate visually to solve important problems. People benefit from Mural's speed and ease of use in creating diagrams, which are

popular in design thinking and agile methodologies, as well as tools to facilitate more impactful meetings and workshops. Mural is built on easing the following process:

- Empathizing with customers
- Planning for the future
- Brainstorming new ideas
- Designing for impact
- Evaluating what works best
- Learning better decision making



Teams White Board

[Microsoft Whiteboard](#) is a free-form digital canvas where people, content, and ideas come together. Whiteboard integration in Microsoft Teams meetings is powered by the Whiteboard web app, which lets Teams meeting participants draw, sketch, and write together on a shared digital canvas.

Users can share a whiteboard to make it available to all participants in a Teams meeting. That same whiteboard is simultaneously available in all the Whiteboard applications on Windows 10, iOS, and the web app.

Strategy and tactics

All that glitters is not gold, you've just deployed one of the above tools, are collaborating virtually on a constant basis, but feel that there is one more aspect missing. Structure. Although some of you or your team members understand the value of collaboration tactics, have mastered empathy and all that relates to body language, it's a different game virtually.

One of the most interestingly rich corners of the internet is [Atlassian plays](#). Plays are free workshop resources that help teams work better together. Each Play tackles common team challenges and breaks down the steps and actions needed to address them.

Play instructions are designed so that you, your teammate, or a team lead are prepared to facilitate the workshops and guide these important conversations that remove team friction.

Most Plays require pre-work, a scheduled meeting, and end with action items to move projects or teamwork forward.

The following is a series of most interesting plays to help you and your team jump comfortably into the digital domain:

Icebreaker Activities

This play develops personal connections that help you do your best work together.

OKR

OKR is a goal setting methodology that is designed to push teams beyond their comfort zone.

The 4 L's

This play is used to build a culture of learning and self-awareness.

Premortems

This play allows you to visualize risks and opportunities for the project, then figure out how to navigate yourself away from (or toward) them.

Disruptive Brainstorming

This play allows you to come up with a long list of great ideas in a single brainstorming session.

Clean Escalations

This play allows you to unblock teams stuck on decisions, conflicts, or issues and to establish a rational and collaborative escalation path.

DACI

This play allows you to define roles for making high-impact or high-risk group decisions.

Empathy Mapping

This play allows you to catalog and group your customers' needs and reinforce persona-based design thinking through an intimate understanding of your target customer.

III- Digitizing a Business

There are very little verticals globally that don't contain hurricanes of disruptions happening daily. Without the right strategic investment in technology, the chances of losing are great. Markets are lost, revenue is choked unless you increase use of technology to personalise. Increase connectivity, manage data, boost productivity, and stay in touch with your clients.

You've probably reached this part of the toolkit and wondered why there hasn't been much thought put from you yet about how to digitize your business in particular. This is mostly because the above sections consist of the basic necessities for any digitization process no matter what business you run. The following tools will armor you with ways to digitize your business in a particular unique way that will differentiate you from your customers. Used wisely, the swiss army tools below can be customised in efficient flows in such a way as to provide you with a competitive advantage against all in the field.

The first task in creating a workflow process is to identify the different sections of your business you would like to digitize. You can do that individually or with your partners / collaborators, but what we care most about is the ability to deliver on such a change.

The vision for change, regardless of where it came from within the business has to be embraced by all members of the team. For that, you should identify manual flows with

the following properties:

- Tasks that can be automated (verification of certain information)
- Tasks that need authorisation from multiple parties
- Repetitive tasks
- Tasks that need to be rolled out en-masse (surveys)

A key concept in digitizing is sequentially picking up manual flows, planning their digitisation,

testing the digitisation, improving and iterating until the digitisation is optimised. This will minimise risk on other aspects of the business while improving overall turnover.

Draw the process, both in its manual form and its digital form using tools like:

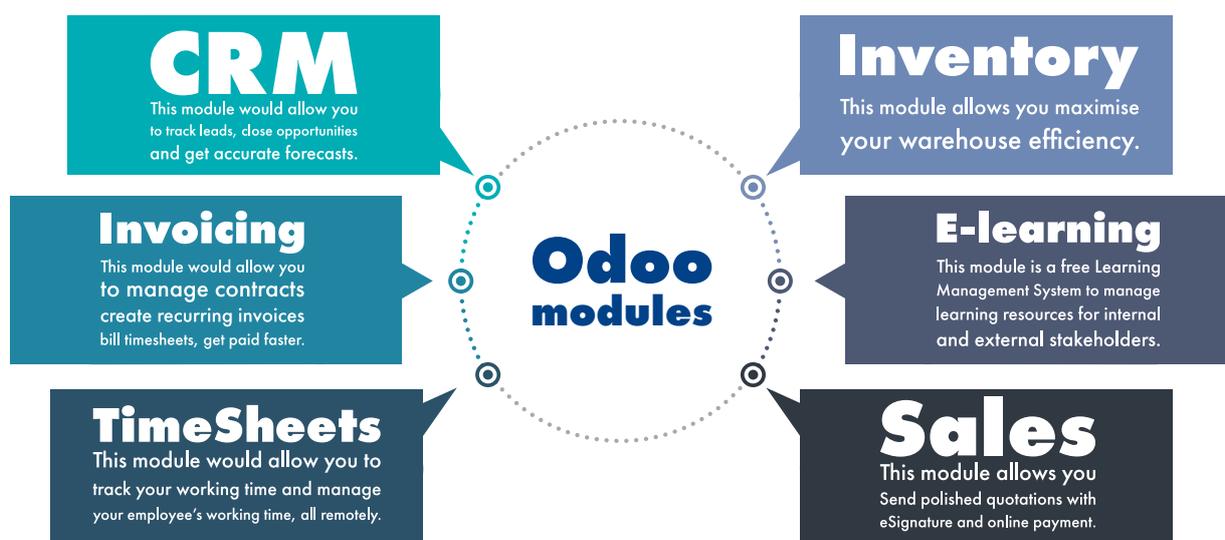
- [LucidChart](#)
- [Miro](#)
- [Mural](#)

You know what needs to be digitised, and you look forward unsure of the tools you can use for the digitisation process. We propose the following set that will aid you in transiting your business to the digital domain.

Business processes

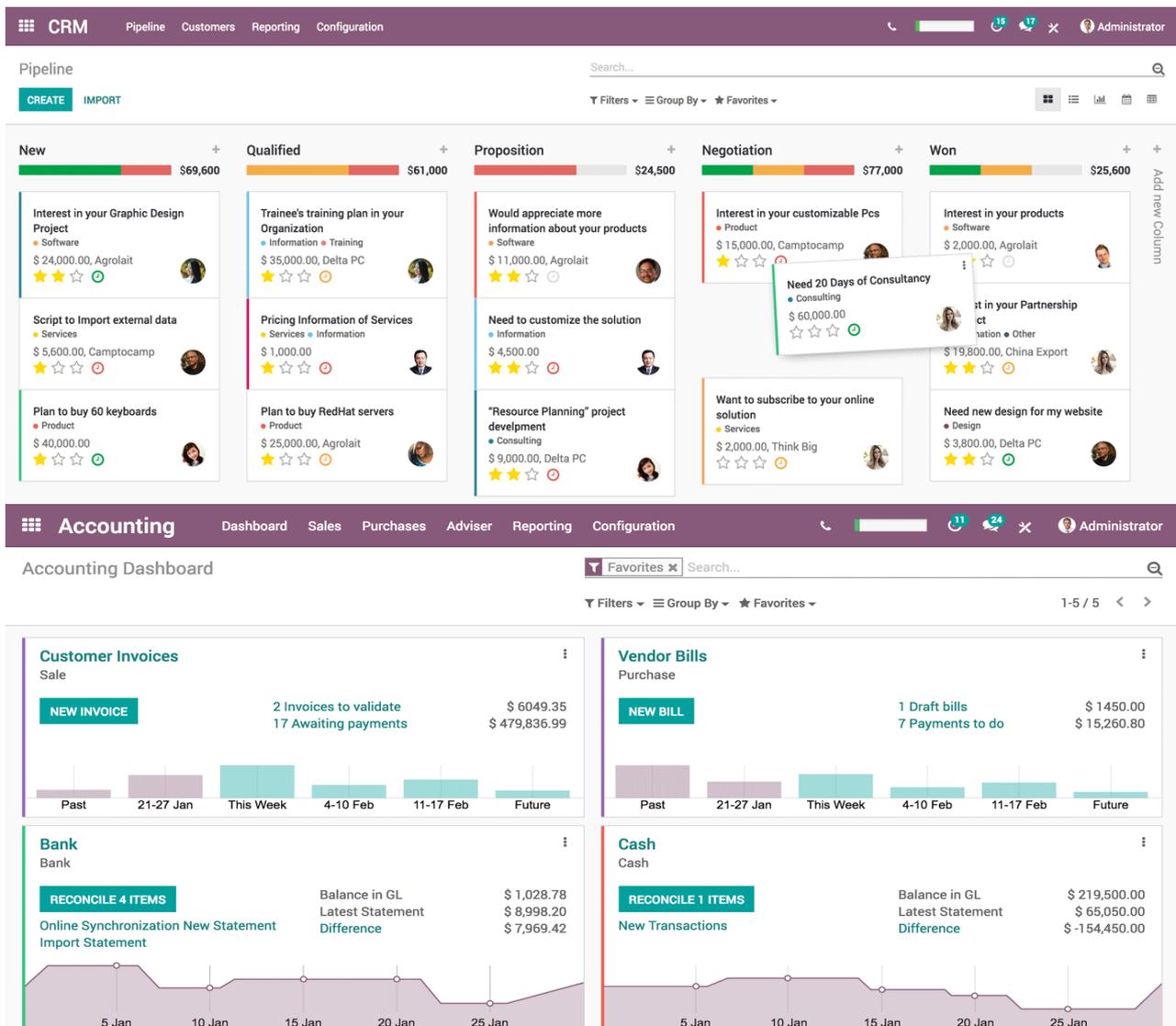
Odoo App

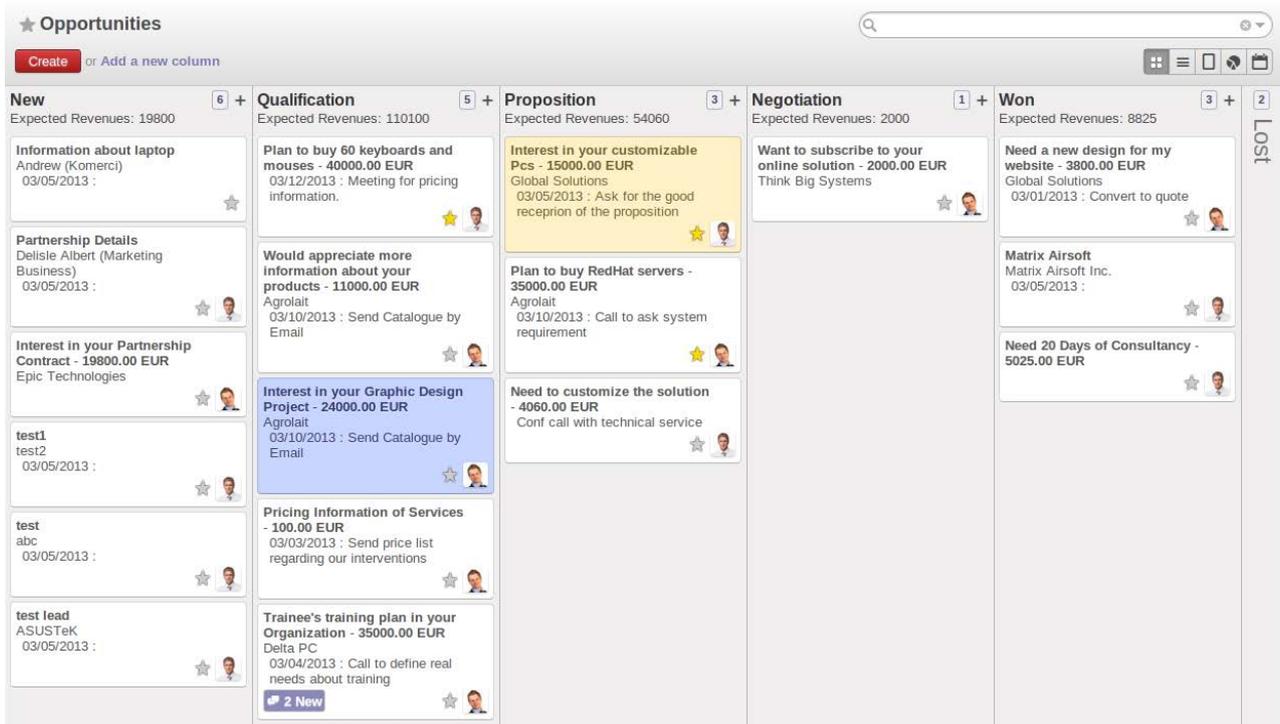
Digitizing your operations is a transformation process that happens best when applied to the whole organisation ,department by department .Take every department and list all the physical /non-digital processes .Replacing these processes with digital alternatives and automating them as much as possible is possible using tools like [Odoo](#) .Odoo is an open source business management software that includes a multitude of modules like:



Each of these modules is able to give you a digital alternative to the physical processes you have while at the same time being connected to the rest of the modules .As information is shared digitally ,it can be used across the organisation in a more transparent / quick manner. This might be the most demanding portion of digitising your business. The interoperability of different modules will save you time ,money

and effort in investing in integrating different systems .The open source nature of Odoo will also allow you to gather expert feedback from a global user base ,while keeping your costs down to a minimum .The cost of deploying this platform is far less than commercial competition and would allow you to dive in head first into a holistic digitisation process.





Digitising customer facing portals

Revamping your website

Customer facing portals are one of the key pillars that can be digitised to expand the reach of businesses both in fragile contexts and with businesses with a global reach. If your business has not created customer facing portals, it is essential to consider the following tools that would easily allow you to build a customer facing portal.

Such portals can be simple, hosting static content that would give more

insight to customers or potential customers about your business. It would also serve as a reference for other businesses or potential investors to get to know you better.

Creating an online portal can be done via multiple pathways, but the following are the quickest you can set up (or ask anyone with basic programming knowledge to set up)

Just pick one of these themes from [Themeforest](https://www.themeforest.net/) purchase it and set it up:

One great feature included on the above website is categorising themes by use. The following

categories are available:

- Corporate
- Creative
- Blog / Magazine
- eCommerce
- Retail

Another pathway is using services like [Wix](#) or [SquareSpace](#). Even though the startup time to build your own online portal is quicker using these services, and even though you get full support, the amount of custom content you can have in the future is limited and the investment cost is higher.

Advanced web portal revamp (Developing your own systems)

To really fly off as an SME aiming to move into the world of fortified business, you might need the help of a developer that with the following toolset might be able to develop the most customised / cutting edge of systems. You might want to hire such a developer and invest in their skills throughout the lifetime of your business.



Angular is a platform for building

mobile and desktop web applications. Since it's development and support by Google and a wide global community, it allows you to develop complex web applications that drive every aspect of your digital business. Get a couple of Angular developers, support them with an agile framework and let them code away all your problems. Whether its a custom application that drives sales or an internal one that optimises processes, having such is a sharp tool and a solid investment.



Node.js is an open-source, cross-platform, JavaScript runtime environment that executes JavaScript code outside a web browser. What can it help you with? Whether you want to fetch data from different sources, send data to particular sources (like a delivery platform or an analytics one) NodeJS allows you to do all that in an optimised way. It has been at the forefront of languages used to develop APIs globally, having knowledge (or hiring developers) that have knowledge in this domain

will significantly boost your data exchange abilities.



Two easy programming languages that can grow as complex as your business needs are. These allow you to develop web (and more powerfully) mobile applications that can put you at the fingertips (literally) of your user base.



This realtime database and free online hosting platform allows you to put all the tools developed using the systems above online. Firebase allows you to host those applications and through its crashlytics aspect, monitor the usage of the above applications and host them online. Firebase is free for basic use, once your business grows large enough to go beyond the free usage, Firebase fees are worth the investment.

Analytics

One of the key benefits of digitising your workflow is gaining insight on how users interact with the services you provide. Imagine yourself being able to track a customer's thoughts

throughout the different funnels leading to a sale, that's what analytics applications aid you to do.

Once you have set up a customer portal, it is important to integrate analytics into it. One of the most widely used analytics engines is [Google Analytics](#).

By tagging different sections of your website, you will be able to have a clearer overview on the customer journey, modifying the services you offer, and how you offer them on a regular basis to attract more customers. Even if Google Analytics might seem daunting at first, it can be used in a basic manner to track user journeys.

Furthermore, it is easily able to identify your user base, by segmenting you users into different groups based on region / country / gender / interests.

Rather than the particular tool, this section's importance is in the ability to measure progress. Numbers eventually come together to create stories, your insight into how your

clients are interacting with your products allows you to continuously improve on these products and services. This insight can become extremely granular, and with time, would allow you to compare how different clients interact with different options given. This paves the way to A/B testing, enabling and disabling certain features and services and testing how that affects your client's behaviour. This opens the path to exponential growth, SMEs growing to global enterprises.

Newsletter

Newsletters have been the traditional tools to reach out to customers since the dawn of online communication. Their power is not to be taken for granted even in the age of social media. Newsletters are able to provide you with a platform to target your audience in a precise way, using custom templates, with deep analytics. It is that ability that attracts SME's globally to design newsletters and send them out to their user base in a frequent manner.

One of the more powerful (yet,

free for SMEs) platforms out there for managing newsletters, building them and sending them out is MailChimp. Using mailchimp, you can segregate your audience into multiple groups and target these groups with different campaigns. By designing newsletters that fully embrace your company identity, you find a way to reach clients outside the algorithms of social media platforms like facebook and instagram. Each email you send will be opened by your client based solely on the attractiveness of your brand and your email subject, rather than based on vague and sometimes random rules.

Another powerful newsletter management platform is SendInBlue. Being cheaper than Mailchimp for larger numbers of emails sent and having a wider interface for automation, SendInBlue is starting to spread more in the SME world.

Step by step guides:

- [Mailchimp Guide](#)
- [Mailchimp Guide II](#)
- [SendInBlue Guide](#)
- [SendInBlue Guide II](#)

Setting up your webshop

Having a webshop is a step forward towards reaching more clients in a larger geographic area. Especially in the times of Covid-19, creating a webshop limits the amount of physical interaction you have with customers, saves you shop rent space and utilities and allows you to constantly update the contents of the shop after integrating with sales analytics. A few options are available for you as an SME wanting to set up a web shop. The following are great tools and guides to setting up:

- [Miswag](#)
- [Shopify](#)
- [WooCommerce](#)
- [OpenCart](#)

Online delivery services

The secret sauce is in last mile delivery. Once your business has gone digital, whether you're offering products or services, having a good last mile delivery service is crucial. These two services are rocking the stage in Iraq, Toters

having dominated multiple arab markets. Reach out, and knock on digitisation step down.



Toters offers an end-to-end logistics service that makes it incredibly easy to deliver to customers everywhere.

They help you:

- Increase your sales and reach new customers.
- Get your products delivered efficiently. They take care of everything from customization to feedback.



Sandoog Iraq

Sandoog is a Last-Mile delivery and order fulfillment service for online and e-commerce businesses. They do the following:

- Order pick up
- Sorting and preparation
- Delivery and cash transaction

Payment Gateways

Providing a complete digital experience for your clients is not complete without integrating with a payment gateway that allows your clients to do online payments. Such gateways are a cornerstone to online shopping. As the options for such an integration is limited in Iraq as much as it is in a lot of MENA countries, local alternatives to Paypal and Swipe take the stage. Among these are the following:

- [FastPay](#)
- [ZainCash](#)

The documentation to integrate with both these services is found on the below links:

- [FastPay Integration](#)
- [ZainCash Integration](#)

Ultimately, the goal is to funnel your clients from being a lead to providing dollars to your bank account. Iterating and improving on increasing the percentage of leads-to-dollars is a major goal for sustaining and expanding your business.

Feedback Collection



[Survey monkey](#) has been the leader in online digital surveys. You can use it to digitise the data collection aspect of your business by integrating the survey results with various marketing / emailing tools. Even though Survey Monkey offers features that are similar to Google Forms, it allows for a much more complete customisation: The forms you build can completely reflect your brand identity. One extremely important aspect that is essential while using any form building software is validation. Make sure that each field in your form / survey is validated against a certain set of rules to ensure proper data reception.

For example:

- Use a phone validator to make sure that the phone inputted has the format of the phone in the given country.
- Use a drop down menu of valid cities in a particular country rather than allow for free text to be used when inputting a city.

- Make sure that passport number information follows the rules of the issuing country.

These will make data standardisation easier on the long run and keep your information well-consistent.



Google Forms

[Google forms](#) provides a quick and easy way to receive client feedback. Once you create a form on forms.google.com and publish it, you receive feedback into a Google Sheets. This tool is free and can be used for a multitude of purposes and an unlimited number of responses, but is limited in the types of elements it provides.



Although Google forms provides an ability to create basic forms and disperse them online, a tool with more flexibility (and options) is [Jotform](#). It is free for small businesses, and contains a high number of customisation made.

Advanced digitisation

Human In The Loop Systems

As your business grows and you find yourself in need of processing quickly, large amounts of data you will reach a point where you will need to use complex systems (Machine Learning driven) to process all the data you have. Whether you have reached that point as an SME, or are looking to process large amounts of data, you can use multiple Human-In-The-Loop systems and resources to aid you with the digitisation process. These systems come at a cost but might be well worth it in case as an SME you obtain big contracts.

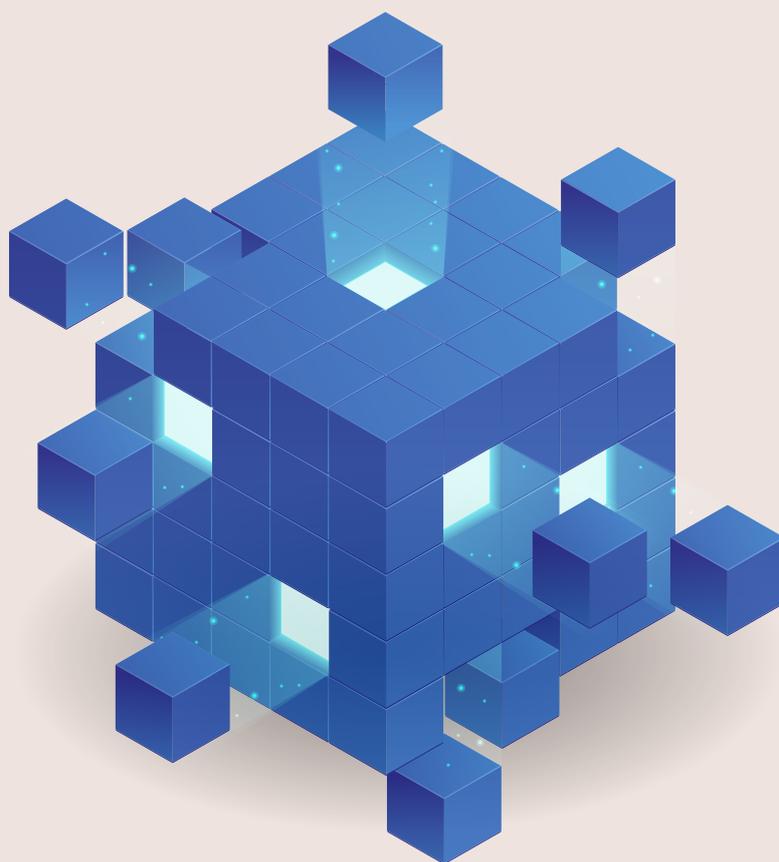
Some of the well known Human-In-The-Loop systems include:

- SamaSource
- HumansInTheLoop
- Appen
- BOT

Big Data processing systems

Digitizing workflows almost always involves data being exchanged in different formats. Whether you have excel sheets filled via some google forms or data entered through a web portal, we need to modify this data and clean it in order to include it in our digital workflow. That data can be taken in bulk, and edited in bulk. Editing large sets of data manually takes a long time, doing it manually every time data is received is even more of a time-consuming process.

These systems allow you to easily process data that is the result of a digitisation process. By using tools like Trifacta, you can aggregate and dissect data and prepare it for visualisation in tools like Tableau.





IV - Putting everything together

You might find the above daunting, but major business strength nowadays is based on agility. Digitally native companies are changing the game in many markets. The middle east have the highest potential for SMEs to lead in this process. Do not be timid about the process, the goal is not only to improve costs or make things a bit more efficient. The goal is to self cannibalize, to change completely from the inside so that change becomes normal and a feature of the business. The digitisation process in this light is a need rather than an option. If your aim while using the above tools is to recreate your business, to revolutionise the market you're working in and make competition difficult, you're on the right track. The following are roadmap tools for digital strategy:

- Analyse each and every aspect of your business and set targets to digitise completely. Create a scale for every department / project and classify them as fully analogue, somewhat digital, and completely digital.
- Set the SME vision based on the above, with gradual but complete change written down in a timeline.
- Use expertise, internally and externally to implement the above.
- Share these implementations with other departments thus gathering rapport and eventually support for the remaining parts to be digitised.

How to Measure Success

The digitisation process will not happen instantaneously, and depending on the complexity of your line of work, might take between months and years. What matters the most is being able to look at today and yesterday and say to yourself, we're in a better position today than yesterday. To accomplish that, measuring progress is extremely important. Whether you measure the number of clients you process per day, or narrow down your measurements per department / team member, having a baseline of the amount of work done before the digitisation process and comparing it with improvements done after digitisation, and after digitisation improvements thereafter is key.

Once you've digitised an aspect of your business, looking back and analysing the difference in performance will allow you to increase confidence among everyone in your SME towards moving everything to the digital domain.



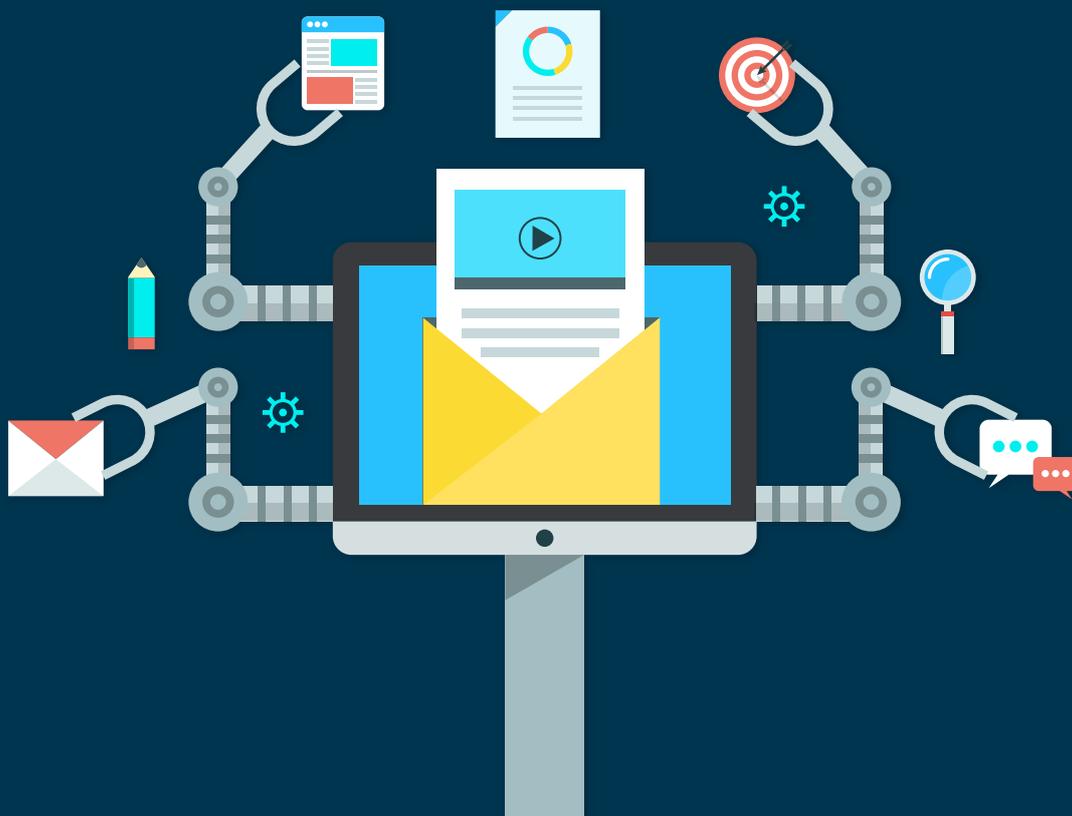
Automating Workflow

Throughout the previous years, a lot of digitisation processes have failed due to constraints of budget or lack of energy from the implementing party. At its core, the digitisation process is about setting KPIs for pre-digital processes, post-digital processes, and improving and iterating on these processes.

A further step in the digitisation process is automation, a key aspect in progressive improvement. This previously included the costly deep integration of various systems. These days you can opt-in to a soft integration that needs no coding skills on your team.

With these various tools in the toolset of those who would like to digitize their business, there remains one tool that would glue information coming in from one tool into the other. Zapier is one of those tools that glues different aspects of your digital workflows together, performing actions on one tool based on the output of others.

Another freemium tool to use is IfThisThenThat



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