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***METHODOLOGY GUIDELINES FOR ENTERPRISE
SHADOWING IN PROJECT PARTNER COUNTRIES***

- PART B -



Youth Enterprise
Shadowing Schemes

yessproject.eu



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Methodology Guidelines for Enterprise Shadowing in Project Partner countries Part B

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Preface

The “**Youth Enterprise Shadowing Schemes – YESS**” project, is designed to contribute and support the fight against unemployment among young people and, at the same time, influence their decision as to the career to be followed. This will be attempted by enriching their understanding of the practical sides of entrepreneurship and self-employment, through engaging them in so-called “**Enterprise Shadowing Scheme**” (E.S.). In many countries, such schemes have been shown to be quite effective educational processes.

The specifics of how such schemes should be organised and implemented in the context of the YESS project, are presented in this document. Its objective is to ensure that these specific kind of activities are carried out in a similar fashion in all countries participating in the project, i.e. Cyprus, Greece, Italy and Poland, thus allowing comparative consideration of experiences gained and assessment of results.

It is pointed out that the “**Guidelines for Enterprise Shadowing**” presented in this document concern a part only of the project’s “training component”, as this is described in the YESS Project Proposal’s Intellectual Output 2 (O2), which also includes a substantial amount of target group participants’ training (face-to-face and eLearning), on a variety of topics. In particular, the document focuses on that part of O2 which involves the organisation and implementation of “enterprise shadowing” by YESS training activities participants, either in enterprises in their home countries, or abroad.

This document’s preparation was undertaken by APOPSI S.A., the Greek project partner. Its author, Professor Joseph Hassid, acknowledges with thanks other project experts’ contribution, especially in making the suggested E.S. organizational arrangements as realistic as possible for all partner countries.

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1. The YESS Shadowing programme- Introductory remarks

Among other much tried methods aiming at preparing and encouraging young people in setting up their own businesses, “shadowing an entrepreneur” constitutes a source of valuable experience whereby young persons may learn about starting (and, later on, about operating and developing) a business, by following, through the day, as a “shadow”, some already established entrepreneur. The “shadowing an entrepreneur” experience constitutes a temporary exposure to the workplace of a business. Young people participating in such schemes witness, first-hand, an enterprise’s environment, the challenges this presents, the required skills in practice, the value of entrepreneurial training and, therefore, become able to consider alternative career options. The specific practice is designed to increase career awareness and help model aspiring entrepreneurs' behavior through examples that reinforce the link between already acquired skills and successfully starting new businesses. Many young people are full of fresh and innovative ideas! They are not however given the opportunity to explore their ideas or to take the first step in setting up their own businesses. “Enterprise Shadowing” provides young persons aged 18-30 the opportunity to see what it is like to be a business owner. Entrepreneurs accessible to them are considered to be best placed to help these young people understand the “real business world” and prepare themselves for becoming part of it. Real entrepreneurs are expected to help young persons understand the reality of being their own boss, the highs and lows, the practicalities of business, together with the emotional journey of taking their future into their own hands. Enterprise Shadowing gives them a flavor of life as an entrepreneur, the day to day challenges, decisions and activities for running a business.

As indicated, the YESS Enterprise Shadowing programme’s main objective is to facilitate exchanges of experience, learning and networking between young people / entrepreneurs-to-be, with established entrepreneurs (Host Entrepreneurs). In matching young persons with established Host Enterprises/Entrepreneurs directly, the programme eliminates the cumbersome and cost-adding function of intermediary organisations. Indicatively, some of the characteristics of similar previously implemented schemes that YESS, by its design and implementation methodology, try to avoid are the following:

Non-involvement: One of the main disadvantages of ES is that it limits the involvement of the trainees to observation only and provides them with a basic only understanding of the work processes, while the opportunities presented for “hands on” experience, may, in some cases, not relate to the core functions of the job.

Distortions: Shadowing an entrepreneur who is himself ineffective, might give the trainee a false picture of the job, and, as a result, he might have to spend more time “unlearning” the false inputs provided by such entrepreneurs.

Intrusion: Many enterprise staff become and remain conscious to someone observing them and tend to portray a better than usual performance.

Disruption: Many “hosting” entrepreneurs may become conscious of the time (or other) cost of providing good quality presentations and guidance services to young “intruders” disrupting the enterprise’s operation and tend to downgrade the whole practice.

It is argued that the Methodology for Enterprise Shadowing, to be described in this document, allows all shadowing participants, i.e. those shadowing and those being shadowed, to avoid above malfunctions and cooperate effectively, ensuring the best possible balance between potential costs and expected benefits.

2. The YESS Shadowing programme: how will it work?

2.1 Overview of the shadowing programme's basic principles.

The YESS Enterprise Shadowing programme's design and implementation is based on five methodological principles, which are, subsequently, reflected in the specific organizational arrangements specified for the programme's successive phases. These principles are:

PREPARE: This is the first stage of the ES experience where the participating young people get an opportunity to understand basic elements of entrepreneurship.

MEET: The "Host Enterprise" (HE) meets with the young persons. The HE should use this opportunity to get to know the visiting young people, by asking appropriate questions in order to judge if a young person is a novice or has some experience. At the same time it is equally important for shadowers to understand some crucial of the enterprise hosting them, its environment, its activities etc.

SHOW: This is the stage where the young people observe the HE perform his/her daily activities. Depending on the industry, they accompany the HE on their daily rounds and/or assist him/her with minor tasks, while carefully observing the tasks being performed.

ALLOW: This is the "riskiest" stage and the main innovation of YESS project. The young persons "shadowing" the entrepreneurs may be allowed to participate in some simple tasks that they have observed. This provides them with some "hands on" experience, whilst having the safety net of being closely supervised by the host.

REGULAR CONTACTS/BRIEFINGS: Here a young person will shadow the host for specific activities over a period, which are all preceded by a mini brief and completed by a periodic follow-up debriefing session. This may work best when individuals work near to the host and the host can then advise them of dates and times of specific activities which are of value in understanding the entrepreneur's role. In cases the host himself finds it difficult to devote time for such debriefing sessions, a qualified mentor may undertake the task.

The proposed project's innovative character is supported by the fact that, contrary to other "business shadowing" schemes implemented in the context of various international or national programmes, in which "shadowing" is organised as a young persons' specific activity undertaken in collaboration with some host enterprise, **the YESS Enterprise Shadowing is made part of an integrated "Training-Briefing-Mentoring-Shadowing" scheme**, which provides specific activities for all those to be involved (young persons, mentors and enterprises). These activities, as will be explained, are deployed "**Before-During and After**" the shadowing itself. These interlinked activities are expected to significantly upgrade the project's effectiveness and strengthened prospects of achievement of its objectives.

On the basis of the above principles, the programme is composed of 10 successive short Phases or Steps (see below section 2.2), which, effectively, constitute the **Road Map for all YESS partner organisations**, for implementing, in a, more or less, similar fashion, the Enterprise Shadowing programmes in their respective countries.

2.2. A 10 STEPS Road Map for YESS Shadowing Programme’s implementation

The formulation of a “Road Map” for organizing and implementing Enterprise Shadowing in the various partner countries of YESS project, apart from facilitating the work by all those to be involved (i.e. partner organizations, host enterprises, shadowers and Mentors), will ensure that “shadowing” itself will be conducted in a similar manner in all countries. This will allow comparative analysis of performance indicators and meaningful discussion of similarities and differences of “lessons learnt”.

Such a Road Map, consisting of “10 Steps” is described below. It should be mentioned that:

- **First**, the Road Map refers to the “Shadowing” part of the so-called “Pilot Enterprise Shadowing Programmes” in partner countries, which also includes a functionally related “training part” that precedes actual shadowing.
- **Second**, the Road Map described here refers only to Enterprise Shadowing to be organized in the four partner countries. It does not therefore refer explicitly to the envisaged transnational Enterprise Shadowing, in which a part only of each country’s shadowers will participate. This activity referred in the YESS Project’s Proposal as “C1-Blended Mobility” may well use the Road Map provided with a few only necessary adaptations.

The entire “National ES Programme”, including the training and the shadowing parts and the so-called : “Blended mobility” (C1), has been scheduled to be implemented over a period of 12 months (see Chart below). Shadowing itself is planned to take place between Months 16 and 19.

IO2 Activities	Project Months											
	10	11	12	13	14	15	16	17	18	19	20	21
A1 - METHODOLOGY	█											
A2 – TRAINING MATERIAL			█	█	█	█						
A3 – NATIONAL ES PROGRAMME							█					
C1 - MOBILITY											█	█

■ **STEP 1 - Selection of ES participants (“Shadowers”)**

In each country, the partners will select 20 young people to participate in the project activities, priority will be given to the respondents approached during IO1. If the sample is not satisfactory (i.e. experience, language, studies, interest) then the partners will also reach out to young people via other channels. Furthermore the partners, through their own networks will select around 5- 8 enterprises as “Hosts” (depending on interest and size of the country). Finally, 2-3 mentors will also be selected to guide, work together and supervise shadowing. Training of the selected young persons in each country will consist of 15 hours of f2f training and 30 hours of asynchronous e-learning, through the project’s platform (IO3). Briefings of the selected Mentors and Host Entrepreneurs and staff will take place before shadowing begins. The selected young persons and host enterprises will be matched, with mentors’ assistance and support and the ES commences with an introductory briefing in the Enterprises’ premises and lasts for 5 days, with potential extension by 2 more days.

The selection of young people to participate in the enterprise shadowing will be based on a set of selection criteria to be determined during the project preparatory phase, as well as of structured interviews of shortlisted candidates, in order to select final beneficiaries. For both the identification of mentors and enterprises to participate as Hosts in the Shadowing program, each YESS project partner will publicise a Call for participants, in order to select and recruit the most suitable participants.

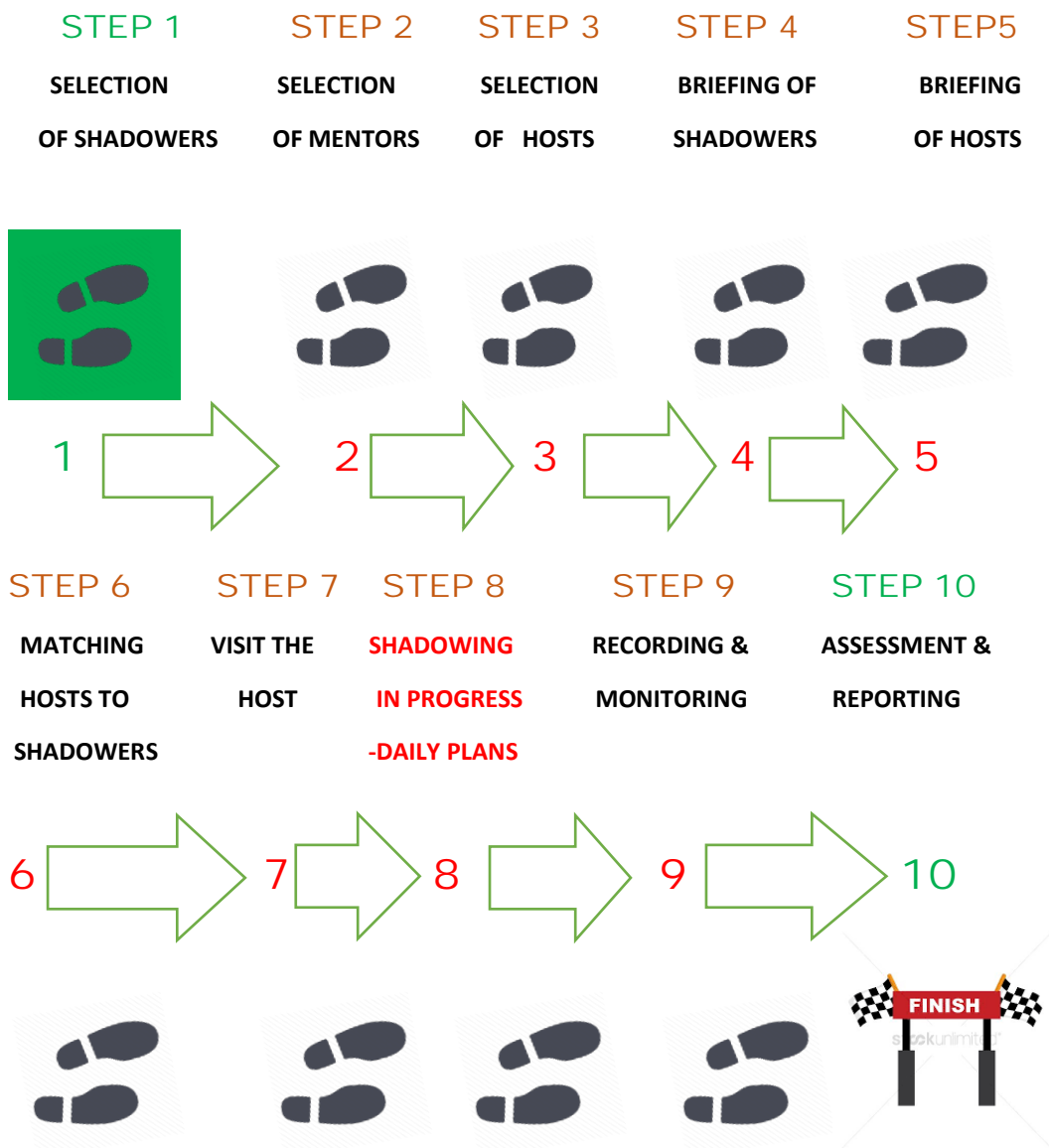
Each partner, using criteria will select 20 young persons to participate in the programme. The suggested selection criteria are the following:

Participants’ Selection criteria	Comments
Relevant knowledge	Previous attendance of entrepreneurship related courses during secondary and or Higher education
Entrepreneurship-related background	Temporary work in enterprises, e.g. summer work. Involvement in family business activities
ICT skills	
Language skills	This criterion will be important in case the person concerned is considered for participation in enterprise shadowing abroad.
Time availability	Candidates will be informed of the time required for attending the training involved (in class and eLearning – 15 and 30 hours respectively) and, subsequently for the Enterprise Shadowing part of the programme (5 full days). They should commit themselves to comply with these requirements.

YESS PROJECT

10 STEPS ROAD MAP *for*

ENTERPRISE SHADOWING PROGRAMME'S IMPLEMENTATION



■ STEP 2 - Selection of ES Mentors

Following the Programme Participants' selection, each partner organisation, will select 2-3 Mentors to guide, work together and supervise selected programme participants. Mentors will also operate as intermediaries between all participants, solving problems that may arise, during the programme's various phases. They may be selected among the organisation's relatively more senior staff or among those to be engaged in the training phase, as trainers. Given the relatively wide range of topics to be covered (from a typical enterprise's structure, to more specific topics, such as Launching of products or business financing), those to be selected need to have had an equally wide exposure to an enterprise's different departments and functions.

The suggested selection criteria for Mentors, are the following:

Mentors' Selection Criteria	Comments
Knowledge of the programme's training topics	Among a Mentor's tasks is to support programme participants in comprehending the training material provided. During the programme, a number of hours will be devoted for groups of participants meeting their mentor for discussion ensuring proper comprehension of delivered training material.
Experience in working with young persons	Such experience may have been gained through the person's involvement in programmes, similar to Enterprise Shadowing, e.g. apprenticeship.
ICT / Language skills	
Time availability	It is expected that a minimum of 5 -10 hours will be required from each Mentor for participants' mentoring during the training part of the programme. An equal number will be required for periodic meetings during the "shadowing" part. In the case of "shadowing abroad" mentoring will be provided by Mentors appointed by the partner organisation in the hosting country. All selected Mentors should commit themselves to comply with these time requirements.

■ STEP 3 - Selection of Host Enterprises

The next STEP is for the project partners to select the Host Enterprises, that is the enterprises that the selected shadowers will visit and, in line with the programme's

provisions, will stay for 5 full working days (normally Monday-Friday, with potential extension for 2 more days) and “shadow” the entrepreneur and other selected staff members, according to a previously agreed “Work Plan”.

The Programme’s initial surveys among entrepreneurs (Intellectual Output O1), has revealed that, generally speaking, entrepreneurs’ are not familiar with the concept of “enterprise shadowing” and do not have experience from previous involvement in such schemes. This does not allow a prediction that there will be too many enterprises to select from! As a result, **the main criterion for selection of Host Enterprises will be an enterprise’s expression of interest to operate as a “Host” and provide the services expected to the group of shadowers.** Furthermore, in those same surveys, entrepreneurs indicated that, besides being, in general, willing to get engaged in Enterprise Shadowing programmes, they have the capacity to contribute staff time for guiding and mentoring the shadowers.

Hosts may be enterprises in any activity sector. All of them will be requested to prepare an **Enterprise Profile** for distribution to shadowers and Mentors. This will facilitate shadowers – Hosts matching (see STEP 6 below). In addition, Hosts will be also requested to prepare a short **Industry Profile**, presenting the main characteristics, performance indicators and main challenges faced by the industry in which they operate. These will also be distributed to shadowers and Mentors and discussed during the latter part of shadowers’ training and in view of the shadowing part.

It is envisaged that, in each partner country, 5-8 Host enterprises will be selected. This implies that, each of them will host groups of 3-4 shadowers. Briefing Notes will be prepared centrally, translated in all partners’ national languages and distributed to all Mentors and shadowers.

■ STEP 4–Briefing of Shadowers.

During the latter part of their training programme (face-to-face sessions and eLearning), shadowers in all partner countries, will be briefed on their tasks and responsibilities related to shadowing. Partners’ Mentors will explain: **(a) the objectives of shadowing, (b) its duration, (c) what they are expected to achieve, (d) how they are expected to work with other shadowers in the same group, (e) how they are expected to cooperate with the Host enterprise’s Liaison/Mentor and the Partner’s Mentor, (f) How their activity will be monitored and assessed and, finally, (g) What sort of Reports they will have to submit at the end of the 5-days long shadowing.** They will also be presented with the Host Enterprises’ Profiles and the Industries’ Profiles collected. Guidelines and associated Templates for these

Briefings will be prepared centrally, translated to all partners' national languages and used by all Mentors in partner countries.

■ **STEP 5–Briefing of Hosts**

The Enterprises which offered to host groups of shadowers, have already been briefed during preceding discussions that led to them being selected. At this stage, additional, more specific, briefing will be offered to their staff members appointed as Liaisons/Mentors with Shadowers. Partners' Mentors will meet their Host's counterparts and sort out administrative and Technical details concerning shadowers' visit to the Host enterprises and their subsequent shadowing activities' Plan. To facilitate this part of Hosts' Briefing, detailed **Check Lists** and associated instructions will be prepared centrally, translated to all partners' national languages and used by all Mentors (i.e. those appointed by both the partners and the hosts) in partner countries.

■ **STEP 6–Matching Hosts to Shadowers.**

The 20 young persons that participate in the training part of the programme, having been briefed on their tasks and responsibilities during shadowing will, with mentors' assistance and support, be grouped in 3-4 persons' groups. For this grouping, the criteria to be considered are: (a) the trainees' preferences for shadowing in specific Host enterprises and (b) Mentors' assessment of each trainee's suitability for specific matching, given their background and their prior experiences. Each partner will ensure that all "trainees" have the opportunity to engage in "shadowing" and benefit from the resulting experience. At this point, with the shadowers' groups formed and matching with Host enterprises decided, the shadowing part of the Programme is ready to commence (see STEP 7 and subsequent).

■ **STEP 7 – Shadowers' Visit to Host Enterprises**

Shadowing will begin after the completion of the training part of the Programme and all participants will have been briefed, by the Mentors appointed, on their tasks and responsibilities. Shadowing will, typically, commence with an Introductory Presentation in the Enterprises' premises, during which the Host Entrepreneur and the Enterprise's appointed Liaison Mentor will present their enterprise to visiting group of shadowers and inform them of the Daily Activities Plan, prepared for them. During this first meeting, shadowers will have the opportunity to discuss with the Host Enterprise representative, a series of general and more specific issues concerning their hosts' motivation for entrepreneurship, as well as the kind of preparation an aspiring entrepreneur, like themselves, should undergo (see below list of indicative questions that may be posed and discussed).

General questions to the "hosting entrepreneur"

- What education/training did you have before becoming an entrepreneur? How helpful was it in getting you the role and supporting you in the role?
- Are there any other experiences - work or non work related - that have supported you in your career?
- If you could go back in time would you do anything differently in preparation for this entrepreneurship path?
- Are there any journals or career related web sites you think would be helpful in learning about this role?
- Are there any professional groups I could join that would be useful to me?
- What qualifications do you feel are important for this role?
- What personal qualities do you need to succeed in this role?
- After all, why did you decide to become an entrepreneur? Was it what you expected it to be?

Entrepreneurship Pros & Cons

- Would you choose the same career if you were just starting out? Why or why not?
- Do you have any special words of warning or encouragement as a result of your experience?
- If you could change any aspect of your career/ role what would you change?
- What do you feel are the most challenging elements of your role?


The entrepreneur's "job" itself

- Could you give me an example of a typical day for you in this role?
- What do you spend most of your time doing?
- In terms of a career path what would that look like for this sort of role? Where could you progress to?
- Who do you work with and what are the relationship links?
- How important is team work to this role?
- How often do you work alone?
- How much of the work is self-directed and how much is regulated by others?
- What are usual work patterns like in your role?

■ **STEP 8 – Enterprise Shadowing in progress – Indicative Shadowing Content / Daily Activities’ Plan**

Following the introductory discussions with the Host Entrepreneur (see STEP 7) and probably more staff members of the Host Enterprise, **actual Shadowing may now begin!**

The partner’s Mentor, in collaboration with the “Mentor” appointed by the Host enterprise, will have already prepared **Daily Activities’ Plan** for the group of shadowers. This will be distributed to the Shadowers’ Group at the end of the previous day. Each Daily Plan will indicate:

 Youth Enterprise Shadowing Schemes		Date: --/--/----	Shadowing Day: 2
• Topic of the Day		
• Short description of shadowing content		
• Start time / End time		
• Enterprise Dpt.(s) to be visited		
• Persons to meet, discuss with, “shadow” and interact		
• Other information		

Shadowers, guided by the appointed host enterprise’s staff member(s) and/or the Partner’s Mentor, will spend the day according to the Plan. Regarding the “**Topic of the Day**”, this will be consistent with the topics covered during the preceding training phase of the programme. In other words, having gone through training in topics such as:

- ***The character and content of “value chain” in an enterprise***
- ***Launching of a new product or service***
- ***Funding of business operations,***

shadowers visiting specific departments of the host enterprise, shadowing members of staff, discussing with them how the specific Department works, what is its value for the entire enterprise and other similar issues, will have the opportunity to realize how the topics taught operate in a real enterprise.

The process continues for 4 more consecutive days, each day visiting a different Department of the host enterprise, shadowing specific members of staff working in those Departments, collecting information and experiences, recording their activities and, step by step, approaching the final Steps of the **Shadowing Road Map**.

■ STEP 9 – Recording and Monitoring

As indicated, during Shadowing (STEP 8), shadowers record, on customised Forms, their activities, information received from staff being shadowed, experiences gained and other issues which they would like to somehow discuss further.

At the end of each day, these Forms are collected by the group's Mentors and, once the day's Shadowing is completed, at least half an hour is devoted to discussion of the shadowers' Daily records.

Mentors are also recording, on other customized Forms, their own observations regarding each shadower's performance.

■ STEP 10 – Assessment and Reporting

This is the **final Step** of the Shadowing Road Map! Based on their daily notes and other material obtained during their "Shadowing Week", shadowers will present Assessment of their experiences. Host Enterprises and Mentors will prepare similar Reports. Partners will process all Evaluations and prepare an "Evaluation of National Pilot ES" Report. IO2 Lead partner (P4) will prepare a Synthesis, presenting the entire partnership's results and experience.

Assessment of the week's shadowing activities will ideally be based on three complementary Assessment Forms (centrally prepared and distributed to project partners for translation in their national languages and use):

- **Assessment by Shadowers**
- **Assessment by the Partner's Mentors**
- **Assessment by the Host Enterprise's Mentors** and, potentially, by other enterprises' staff members who were also engaged in the shadowing process).

Partners will process all Assessments and prepare an "**Assessment of National Pilot Enterprise Shadowing**" Report. IO2 Lead partner (P4) will prepare a **Synthesis**, presenting the entire partnership's results and experience.

2.3 Concluding remarks

The detailed methodology guidelines provided in this document and the description of how all participants (i.e. young people - shadowers, host entrepreneurs and mentors) will be engaged in the preparation and the implementation of the Enterprise Shadowing process will constitute common Reference for all partners' activities in their respective countries.

As already argued, the formulation of a **“Road Map”** for organizing and implementing Enterprise Shadowing in the various partner countries of YESS project, apart from facilitating the work by all those to be involved (i.e. partner organizations, host enterprises, shadowers and Mentors), will ensure that “shadowing” itself will be conducted in a similar manner in all countries. This will allow comparative analysis of performance indicators and meaningful discussion of similarities and differences of “lessons learnt”, thus strengthening the particular activity's impact and transferability prospects to other similar applications, in partner countries or elsewhere.

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