



Training Needs Analysis: Its Contribution to Marketing

One of the oldest marketing principles, as we all know, is customer closeness. The best salesmen know they do not achieve good sales if they do not keep in close touch with their customers—and they keep records of these contacts. Why? Keeping in good contact with your customer enables you to know his problems and needs so that those which are within your own area of influence can be met by your products.

But are trainers the same as salesmen? Is “customer closeness” applicable to training?

Working to a system for the marketing of CEFE training, whether in the context of the CEDP or not, means firstly conducting a training needs analysis (TNA) and secondly keeping it regularly updated. TNA is a marketing tool which is essential to all trainers and training institutes, but it can be easily overlooked. In the modern, fast-moving world, the needs of individual and institutional clients also change more quickly—and we should continually update our records of these needs to keep our training products in line with perceived or actual demand.

At the end of the recent Planning Workshop in Cebu, CEDP management utilized resources from Jerry “Jing” Pacturan, our trainer-coach based in Northern Mindanao, which he uses to maintain his own records of contacts—and the results were quite enlightening for those trainers who attended. Jing showed the participants how we often fail to analyze our successes and failures properly—for this he used the marketing exercise introduced by Deepak. Lourdes “Lulu” Binuya and Nunilon “Noli” Cultura, the former



Christopher Prior, Adviser to the Countryside Entrepreneurship Development Program (CEDP) and strong supporter of CEFENet. With his cultivated skill in finding opportunities, “Cool Chris” has become one of the foremost salespersons of the network. He works for Luso Consult, which also co-manages other CEFE projects.

from Southern Mindanao and the latter from Northeastern Mindanao, competed for sales of notepads and learned a lot about their individual techniques. From this, the discussion broadened into the area of analyzing the needs of our own clients. As we know, all training efforts require a needs analysis, so how do we proceed?

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CEFE is a comprehensive set of training instruments designed to stimulate positive interventions in the small and medium enterprise development process. It uses experiential learning methods to develop and enhance the competencies of two essential groups of actors: entrepreneurs, so they will improve their performance, and personnel of enterprise support institutions, so they will foster an entrepreneurship-friendly environment. CEFE is promoted worldwide by the German Agency for Technical Cooperation (GTZ).

CEFENet is affiliated with GTZ's **CEFE International**.

(from p. 1) Training Needs

The most frequently used methods include interviews, focus group discussions, surveys/questionnaires, document analysis and observation. More than one of these can be used for the same analysis. The interview is good because it reveals feelings, causes and possible solutions but it is time-consuming. It creates

From the CEFENet Vice-President

Finding a niche in the Philippine training market is the present challenge for CEFENet.

This issue explores the areas that the organization and its members have already investigated and points to a few others that offer great opportunities both in income and in service to society. The materials included here certainly point to the lead topics of the forthcoming 4th Philippine CEFE Trainers Conference—education, industry and enterprise development—and its theme, “Moving Towards an Enterprising Society.”

The lead article, written by our very

maximum freedom of expression and opinion but can make the respondent feel he/she is “on the spot.” But a questionnaire also has its pros and cons—although it can reach many people in a short time, the return rate may be low and there is little provision for free expression of unexpected responses. Designing a questionnaire is also not easy—some ample questions are in the CEFE compendium and on the CEFE CD-ROM, but these cannot just be adopted without considering what is appropriate for the local situation. Even a well-constructed questionnaire may provide limited effectiveness at getting at causes of problems and solutions—training is not the answer to every problem, as we know. A test may be used as well, and can be useful in diagnosing specific deficiencies or classifying trainees and their needs, but it may not be easy to make final conclusions if relevant for course adaptation and not every person feels comfortable. From the collection of information, it has to be sorted and prioritized—but, of course, validated too on a regular basis if the



“Intimate” Jing, CEFENet VP, was recently in Thailand and Vietnam to introduce modules for farmers and micro entrepreneurs.

own “Cool” Chris Prior, talks of the importance of TNA in finally finding our niche. The other articles show us some of the beachheads gained by our enterprising members and the high-potential areas revealed by a number of our meetings and discussions.

Happy reading and see you in Manila!

individual client does not immediately participate in a training course. Equally, training needs are not just satisfied by one course alone—a single training cannot respond to all training needs. Institutional clients too must have their needs validated regularly and there can be several reasons for changes in needs: such changes may be budgetary or related to the target group for which the training is to be carried out.

The discussion outlined here only addresses part of the issues faced by trainers at the local level. However, from the interest shown by the participants of the Mid-Term Planning, CEDP Management has decided to include this topic in the Trainers Conference this May. Details of what is expected will be sent out soon, but these will include every trainer bringing a short needs analysis of five institutional and ten individual clients. This will be used during the conference for an experience-sharing discussion to be held on the third day. In this way, CEDP management hopes to help the trainers systematize their TNA records. This, in turn, should improve the marketing efforts of all CEDP trainers.

Fourth Philippine CEFE Trainers Conference To Be Held in Manila



The conference this May certainly looks exciting for “Easy” Bert Capati, CEFENet Chairman of the Board. Life partner Carla Virtudazo is the Chairperson of the Fourth Conference.

Education, Industry & Enterprise Development: Rounding the Triangle” is the focus of the upcoming conference of Filipino CEFE trainers.

To be held from the 10th to the 12th of May at Riverbend Hotel in Marikina, Metro Manila, the fourth national conference is adopting as its theme “Moving Towards an Enterprising Society.”

Chair Bert Capati, President Anji Resurreccion, and Executive Director Nanette Villanueva, with the help of freelancer Carla Virtudazo, are organizing the event. The conference is expected to bring together an exciting array of decision makers,

stakeholders, and catalysts in education, industry, and entrepreneurship development to forge linkages and strengthen efforts toward an enterprising Filipino society.

Following the format of the Third Philippine Trainers Conference in April 1999, the fourth conference is open to all interested parties, particularly those in the formal and non-formal education sector, industry associations, and organizations and individuals involved in entrepreneurship development training.

For reservations and further inquiries, e-mail either carlav@pworld.net.ph or cefenet@info.com.ph. You may also call Carla Virtudazo at (63-2)4336809 or CEFENet at (63-2)6553296. Registration fee is only P2,500.

Trainers Conference Outline

Day 1 Symposium A – “What and Why Do Schools Teach What They Teach”

I. Panel Presentations

- Panelist 1, Dept of Education, Culture & Sports
– “Basic Education Curriculum in the Philippines
- Panelist 2, Commission on Higher Education
– “General Education Curriculum in the Tertiary Level of Education in the Philippines”

II. Reactions and Plenary Discussion

- Reactor 1, “Education Produces/Reshapes Society”
- Reactor 2, “What Education Institutions Need to Do to Assist in Developing an Entrepreneurial Society”

III. Case Presentation and Discussion

- Forum 1, Enterprise Development Project in Basic Education
- Forum 2, Enterprise Development Project in Tertiary Education

Day 2 Symposium B – “Enterprise Development, Non-Formal Educational Change, and Socio-Economic Transformation”

I. Panel Presentations

- Panelist 1, Technical Education & Skills Development Authority – “Technical Education and Skills and Life-Long Learning”
- Panelist 2, Non-Government Organization
– “Deconstructing Culture and Polity in NGO/PO-Funded Enterprise Development Programs”
- Panelist 3, Industry – “Training and Development Needs in Industry”

II. Reactions and Plenary Discussion

- Reactor 1, “Post-Modernity and the Prospects for Educational and Societal Change”

III. Case Presentation and Discussion

- Forum 1, TESDA Project with an Enterprise Development Component
- Forum 2, NGO Project with an Enterprise Development Component
- Forum 3, Trainers Dialogue with the Chambers and Industry Associations

Day 3 Symposium C

I. Financial Institutions Supporting Small-Scale Entrepreneurs

II. Conference Integration

III. Demonstration of the Business Expense Savings Training (BEST) Game to non-CEDP Cooperators

IV. TNA Activity and CEDP Cooperators’ Matters

For CEFENet members only:

Evening of Day 1: General Assembly Meeting and Election of Officers for 2000-2001

Evening of Day 2: Meeting of the New Board of Directors

Report on the CEDP Mid-Term Project Planning Workshop: CEFENet's Key Role

CEDP is completing its second phase of project implementation by December 2001. Last 21 November-9 December 1999, an external team of consultants commissioned by the Department of Trade and Industry-Bureau of Small and Medium Business Develop (DTI-BSMBD) and GTZ conducted an evaluation of the project.

In order to maximize the benefits derived from this Project Progress Review (PPR) CEDP Project Management called for a Mid-Term Planning Workshop in 28 February-1 March 2000 for all stakeholders to conduct an assessment of the current performance of the project and, given the additional inputs from the PPR, develop plans for the remainder of the project phase. In addition, it was also envisaged that the workshop would define significant accomplishments visible by December 2000 in order to show positive trends in the incremental contribution of the project to enterprise development, and in so doing, to position the project favorably for a possible continuation into a third phase.

Taking part in the workshop were 43 representatives of the cooperating institutions of the project (locally known as "cooperators"), DTI provincial coordinators of CEDP, CEFENet officers, and Project Management. The latter were led by Meynardo Orbeta, BSMBD Director, and Corabeth Magkalas, CEDP Manager. A unique feature of the workshop was the presence of representatives from the private sector on the second day.

As a whole, the quality of participation was excellent. The discussions were open, lively, and conclusive.

The following are the highlights of the planning process:

1. CEDP performance and lessons learned

- There is a need to shorten CEFE courses (New Business Creation and Business Improvement Courses, NBC/BIC) in order to attract SMEs;
- Cooperators need to improve their selection of CEFE trainers, especially in the light of increasing demand for business counseling;
- Cooperators need to have greater sense of ownership of the program to assure its sustainability.

2. Fundamental issues clarified

- CEDP will stick to its original targeted direct bene-

ficiaries of the project—SMEs—as the sector needs to develop more professional and enlightened entrepreneurs; micro-entrepreneurs, though not those engaged in subsistence-type activities, are included in the category;

- Official courses of the program will henceforth include shortened New Business Creation and Existing Entrepreneur Courses. The courses will follow certain quality criteria to be agreed upon by all.

3. Post-CEDP scenario (vision)

- DTI will continue to refer SMEs to cooperators;
- Cooperators will continue training entrepreneurs using the CEDP-CEFE model, maintaining close links with DTI while responding to the demands of the market;
- CEFENet will be the recognized body for assuring the quality of CEFE courses, accrediting trainers and new modules/courses under the CEFE name, and encouraging the continuous development of innovative programs.

4. Roles and responsibilities during the remainder of CEDP Phase 2

- DTI will remain as project coordinator and liaison in CEDP's 15 provinces
- Cooperators will integrate the delivery of entrepreneurship training into their core business. With the shortened NBCs and BICs, they will be able to attract more SME clients, including those in the higher end of the continuum.
- CEFENet's strengthening will be a high priority for the remaining period of Phase 2. Issues like membership and benefits, accreditation of trainers and institutions, quality assurance of CEFE products, and responsibilities for the continuing development of new products will be addressed. The group's financial viability likewise will be ensured.

As a whole, the planning process was a very helpful exercise. It addressed misconceptions by some partners about the project and led some participants in moving away from a "supply-driven" towards a "beneficiary-oriented" development paradigm.

by Consuelo "Pet" Misa, Planning Facilitator

"Pet" Misa is a favorite facilitator for DTI and CEDP's Planning Workshops. She is an acclaimed expert in the ZOPP methodology.

Outline of Shortened NBCs and BICs for CEDP Cooperators

Quickly following up on the gains of the Mid-Term Planning Workshop, CEDP Project Management came up with the "official" outlines of the shortened versions of New Business Creation and Existing Entrepreneurs/Business Improvement Courses (NBCs and BICs). This is to address the project cooperators' running observation that the real target clients of the program—SMEs—are turned off by the long course duration and consequent high course fees.

Below are the outlines that the cooperators can henceforth implement under CEDP. The outlines were drafted by CEFENet's "**Adorable**" **Anji Resurreccion** and "**Naughty**" **Nanette Villanueva** and approved by the management team of "**Matahimik**" **Meynard Orbeta**, BSMBD Director, "**Victorious**" **Corabeth Magkalas**, CEDP Manager, "**Brave**" **Beth Catarata**, and "**Cool**" **Chris Prior**.

1. 5 DAY-NBC

DAY 1 INTRODUCTORY ACTIVITIES

- Registration
- Opening Ceremonies
- Personal/ Group Dynamics
- Surfacing & Leveling of Expectations
- CEFE Concept: Overview
- Administrative Details
- Learning Contract

MODULE 1 Unlocking PECs

- Self -Assessment
- 10 (PECs)
- Pearl Game
- Case Study: The Successful Entrepreneur
- Qualities of Successful Entrepreneurs
- Personal Values & Vision
- Goal-Setting: Form
- Strategizing: Dart Exercise

DAY 2 MODULE 2 Matching Person with Project

- Idea Generation
- Idea Screening
- Macro Screening
- Micro Screening
- SWOT Analysis
- Personal Balance Sheet
- Idea Selection Workshop
- Opportunity Identification: Lecturette

MODULE 3 Introduction to Business Planning Paper Bag-Making

- MODULE 3-A Marketing Aspects
- Mini-Market Game

- Marketing Concept
- Marketing Strategies
- Marketing Mix
- Pricing
- Market Research
- Fieldwork Interview
- Marketing Plan Assignment

DAY 3 MODULE 3-B Production Aspects

- Pancake Exercise/ Tuna Sandwich-Making
- Production Concepts
- Production Process & System
- Plant Layout / Site
- Production Cost
- Production Plan Workshop

MODULE 3-C Organization & Management

- Paper Tower Making
- Organizing the Business
- Management Concepts & Principles
- O & M Plan Workshop

DAY 4 MODULE 3-D Finance Aspects

- BEST Game, Modules 1 & 2
- Finance Concepts & Principles
- Total Project Cost
- Profit & Loss Statement
- Cash Flow Statement
- Balance Sheet
- Financial Ratios

DAY 5 MODULE 4 Viability Test

- Packaging of the Business Plan
- Final Presentation to the Bankers
- Negotiation Skills: Shoemaker Case
- Networking Skills: Cocktail Party

2. 10-DAY NBC

DAY 1 INTRODUCTORY ACTIVITIES

MODULE 1 Unlocking PECs

- Four Quadrants
- Johari Window
- PECs Self-Assessment
- 10 PECs
- Case Study: Mr. Chin
- Qualities of Successful Entrepreneurs
- Dart Game
- CEFE Training Ladder
- Build a Heart
- Goal Setting and Visioning

DAY 2 MODULE 2 Matching Person with Project

- Introduction to Module II
- Brain Tease
- Idea Generation, Brainstorming

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(from p. 5) **Outline**

Picture Association
Round Robin
Idea Screening
Macro Screening
Micro Screening
SWOT Analysis
Personal Balance Sheet (PBS)
Idea Selection Workshop
Opportunity Identification: Lecturette

DAY 3 MODULE 3 Introduction to Business Plan
Envelope Game

MODULE 3-A Marketing Aspects
Mini-Market Game
Market Room Exercise
Walk-through Marketing Plan
Give Model
Marketing Fieldwork

DAY 4 Market Research
Fieldwork Interview
Marketing Plan Workshop

DAY 5 MODULE 3-B Production Aspects
Introduction to Production
Pancake Exercise/ Tuna Sandwich Making
Value Analysis or Scramper
Walk-Through Production Plan
Give Model
Production Fieldwork

DAY 6 Production Fieldwork
Production Plan Workshop

Day 7 MODULE 3-C Organization & Management
Introduction to O&M
Organogram Game
Walk through O&M Plan
Give Model
O&M Plan Workshop

Day 8 MODULE 3-D Finance Aspects
Introduction to Finance
Short Finance Game/
BEST Game Module 2/
Finance Walk Through
Walk through on Finance Plan
Give Model
Finance Plan Workshop
Integration and Packaging of Business Plans

Day 9 MODULE 4 Viability Test
Negotiation Skills
Negotiation Skills: Shoemaker Case
Networking Skills: Cocktail Party

Day 10 Final Presentation to Bankers
Feedback and Critique
Integration of Course
Evaluation of Course
Closing Activities

3. 5-DAY BIC

Day 1 OPENING ACTIVITIES

MODULE 1- SELF ANALYSIS
Why did I go into business?
Am I ready to expand/improve my business?

MODULE 2- BUSINESS ANALYSIS & DIAGNOSTICS
Analysis of Financial Situation
Preparing the 4 Financial Situation
Diagnosis of Financial Situation
Financial Ratios
Workshop: Analysis of Business Finance

Day 2 Analysis of Marketing Situation
Marketing Potpourri
Marketing Concepts and Principles
Competition Analysis
Pareto Analysis
Marketing Proposition
Relationship Marketing

Analysis of Production Situation
Production Concepts and Principles
Flow Chart
Routing Diagram
Time Study
Product Costing
VAVE

Day 3 Analysis of O&M Situation
MBO System
MC-SRQ
TQM

STRATEGIC PLANNING
Data Base
Corporate SWOT
Vision and Mission Statement
Core Values
Action Plan

DAY 4 PROBLEM SOLVING
Fishbone Diagram
Solution Tree
Workshop

GENERATING SOLUTIONS
Improvement Idea Exercise
Disc Analysis

DAY 5 BUSINESS STRATEGY FORMULATION
Macro Screening
Micro Screening
Business Goal Setting

MODULE 3 BUSINESS IMPROVEMENT PLAN
Business Improvement Plan Format
Model Plan
BIP Workshop

MODULE 4 VIABILITY TEST & INTEGRATION
Presentation of the BIP
Feedback and Critique
Action Plan
Course Integration and Evaluation

Entrepreneurship for Teenagers in Public High Schools

"Jubilant" Jim Guanzon leads the team of trainers currently facilitating the series of Trainings of Trainers (ToTs) on the Business Expense Savings Training (BEST) Game for education supervisors. These ToTs are part of the Youth Entrepreneurship and Cooperatives in Schools (YECS) Program of the Philippine Department of Education, Culture and Sports (DECS). They target regional and division supervisors of the subject "Technology and Home Economics" (THE).

Assisting him during the training for Mindanao THE supervisors, held in Maramag, Bukidnon last April, was **"Swabeng" Sandi Chan**. **"Alert" Bobby Dato** assisted in Manila for the Luzon participants, while **Yolly Alim** is set to co-facilitate in Boracay and **Jamus Canalija** in Cebu for the Visayas ToTs. The last two courses are to be held in May.

The training series hopes to enable the participants to conduct training on their own in their respective divisions, with the assistance of the BEST Game trainers of the provincial offices of the Department of Trade and Industry.

Set to undergo the planned local echo seminars are secondary school teachers of THE, which has "Entrepreneurship" as one of its core topics. BEST Game will be used in building up an entrepreneurial behavior among high school students and encouraging activities geared towards cooperativism within school premises.

The next issue of **Braintease** will feature Jim's and his co-facilitators' assessment of the whole series and the participants' reaction to the training program.

Vocational Trainers' Training for Former Muslim Rebels

"Intimate" Jing Pacturan, **"Arty" Allan Mangorsi**, **"Loving" Rita Palo**, **"Jolly-Jolly" Jo Bokingo**, **"Lovely" Lucille Omandam** composed the two training teams for the "Vocational Trainers' Training for Social Integration of the MNLF."

Held in Dipolog City, in Western Mindanao's Zamboanga del Norte on 3-11 April 2000, it was a component of the Community-Based Training for Enterprise Development (CBTED) Program of the Technical Education and Skills Development Authority (TESDA). TESDA is the lead agency of the Philippine government in vocational and entrepreneurship training.

The course for former rebels belonging to the Moro National Liberation Front (MNLF) was assisted by GTZ in its program with TESDA called "Promotion of Dual Training and Education." It aimed to help the participants appreciate the importance of entrepreneurship in community development and describe their own role in the growth of entrepreneurship in their respective communities.

Target participants were two trainers per "State" of the Moro National Liberation Front (MNLF);

there are sixteen such States around Mindanao. However, due to the resulting number of confirmed participants, CEFENet and TESDA had to break up the group into two and the training team had to be doubled in number as well.

All of these were welcome developments though, as more participants meant more dynamic interaction during the course and the presence of Allan, Jo, Lucille, who are from Central Mindanao's Mindanao State University—Iligan Institute of Technology added flavor to the training implementation. "Arty" Allan's presence, in particular, was important as, being a Muslim himself, he was quickly able to adjust to the participants' culture and address their concerns.

A truly surprising sight to many, the former combatants went through the rigor, not of combat this time, but of thorough business planning. They were also introduced to CEFENet's tools and modules that they can use to promote entrepreneurial behavior.

The elating comments of the participants towards the end of the course showed that the objectives of the training had been met.

Company Right-Sizing & Labor Retrenchment: CEFE Trainers to the Rescue!



Union members doing the exciting Sales Management Exercise during the first of ten courses to be sponsored by the government. A sizable separation pay that can be used to set up a business commands serious planning.

The effects of economic globalization and trade liberalization are beginning to be felt in the Philippines, particularly by the labor sector. Since the Asian currency crisis erupted in 1997, thousands of workers have been laid off by companies who have down-sized, right-sized, or closed shop.

In a way, this is welcome news for individual CEFE trainers and CEFENet. More retrenched workers mean more people interested in setting

up a business and willing to pay for entrepreneurship training. More down-sizing firms also mean programs by companies, unions, and government for training their soon-to-be-displaced workers.

The Technical Education and Skills Development Authority (TESDA), the lead government training agency in the country, has one such program. It plans to sponsor within this year at least ten "Entrepreneurship Motivation and Business Planning Courses for Displaced Workers and Dependents." Among the prime movers of this program is Antonio Asper, Vice-President for International Affairs of the Federation of Free Workers (FFW). The federation is one of the nation's biggest labor groups.

Already, the first course has been implemented last March in the Northern Mindanao province of Camiguin. The course, facilitated by Jing Pacturan and Sandi Chan, was conducted for workers who had already been displaced or will soon be retrenched by companies located in Northern and Central Mindanao.

The next courses, to be held in May and June, will be in Western Visayas and in Metro Manila. In the months to come, it will be the turn of the other regions. So, Pinoy trainers, what are you waiting for? Contact your respective TESDA Regional Office now!

Philippine CEFistas Celebrate First Anniversary of Cyberlink

A message from the e-group (philcefe@onelist.com), written by the current moderator, "Betrit" (for "Daddy" Betbet & "Loving" Rita Palo) during the anniversary last 22nd April:

"We think this is an opportune time to inform you that we are just celebrating our one-year anniversary as e-mail forum. It was actually founded on 22 April 1999, Black Saturday). We started subscribing everyone on 28 April but we officially inaugurated it on 1 May 1999, Labor Day. Since then, so many exchanges have taken place between and among the subscribers. Some opted to be quiet, others chose to be busy; but many joined the dynamism."



Indefatigable cyberspace duo "Daddy" Betbet Palo and "Intimate" Jing Pacturan. Along with the Betbet's wife, "Loving" Rita Palo, the two have been facilitating the cyber forum for the past year.