ITC SheTrades & Visa Asia Pacific

Self-Assessment Tool Guide

Elevate your business skills with the ITC SheTrades & Visa Asia Pacific Self-Assessment Tool, specifically designed for micro, small, and medium-sized enterprises (MSMEs). Complete this self-evaluation to receive a comprehensive business competitiveness report and gain access to personalized course recommendations aimed at boosting your competitiveness - enabling you to identify and improve strengths and weaknesses independently. This tool was presented at the "Women Entrepreneurs at the Helm - Become an Agile Exporter" Workshop and Business Networking Event held in Manila on 4th to 6th December 2023. You can view the recording of the session here featuring a demonstration of the Self-Assessment Tool.

Interested? Complete your self-evaluation now by following the steps listed below:

STEP 1: Click on this link to reach the platform's main page: https://www.itcbenchmarking.org/our-tools/small-and-medium-enterprises/assess-0

- If you already registered, click on "Log In" and insert your credentials. Proceed to STEP 5.
- If not, click on "Register" and select the option "I am a Micro, Small or Medium Business". Proceed to STEP 2.

STEP 2: Once you reach the registration page, please do the following:
- A. In the field for "Country" type and select "Philippines"
- B. In the field for "Area of activity" type and select one among the following: "Primary", "Manufacturing", "Services".
- C. In the field "SME" you will find a drop-down menu.
  - If you find your company, select it, and proceed to Step 3.
  - If you cannot find your company, continue to D.
- D. Click on "Cannot find your SME? Create a new one" and start registration.
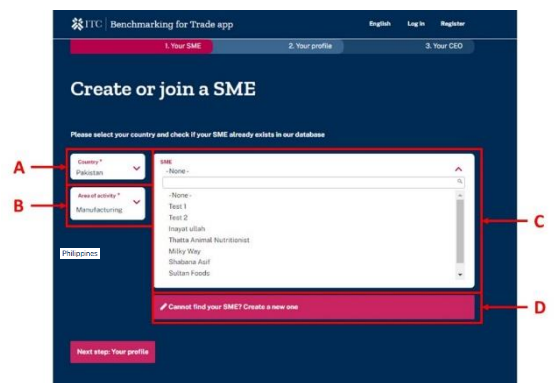
STEP 3: Register your business by completing the required information about the following sections: "Your SME", "Your profile", and "Your CEO".
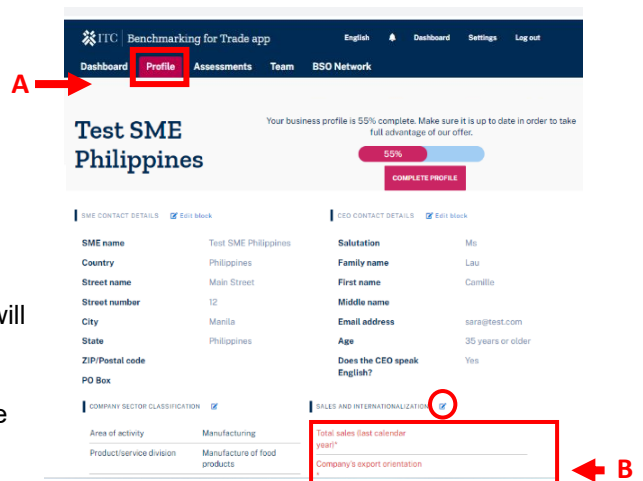
STEP 4: Once your company is registered you will access to your company's space in the platform.

- You will be directed to the "Profile" tab (A) where you will be asked to complete your company's profile. The missing information will be highlighted in red (B).
- To complete or edit the information in the profile please click in the edit icon 📝 market with a red circle in the image on the right.

STEP 5: Go to the "**Dashboard**" tab (A).

- If you are a new user, your Dashboard will show no information.
- Click on "START NEW ASSESSMENT" to initiate the Self-Assessment (B).
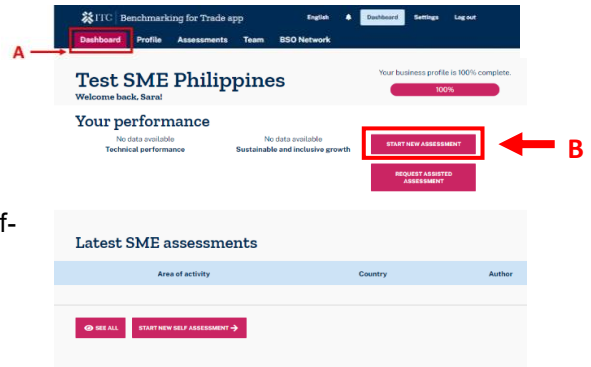
STEP 6: Conduct the Self-Assessment

- You will be directed to the page where you will create the Self-Assessment.
- You will be asked to select a "MODEL" (A). Given that this assessment is conducted as part of the ITC SheTrades and Visa: Asia Pacific project, please select "VISA ASIA PACIFIC".
- Choose the "ANALYST" conducting the assessment. You will find a drop-down menu with the name of all the users linked to your company.
- Press "Start assessment".
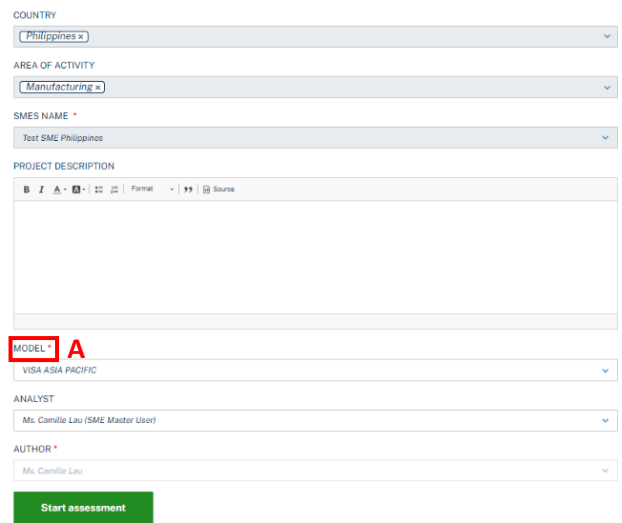
- When launching the self-assessment, you start at the "**Details**" step.
- In the "Details" step you are presented with the information you provided when creating the assessment. You can edit the information if you wish.

- By pressing "Next, you move now to the "**Profile**" step. This step shows you the company information provided by you in the company profile. If you wish to change any information you can do it.
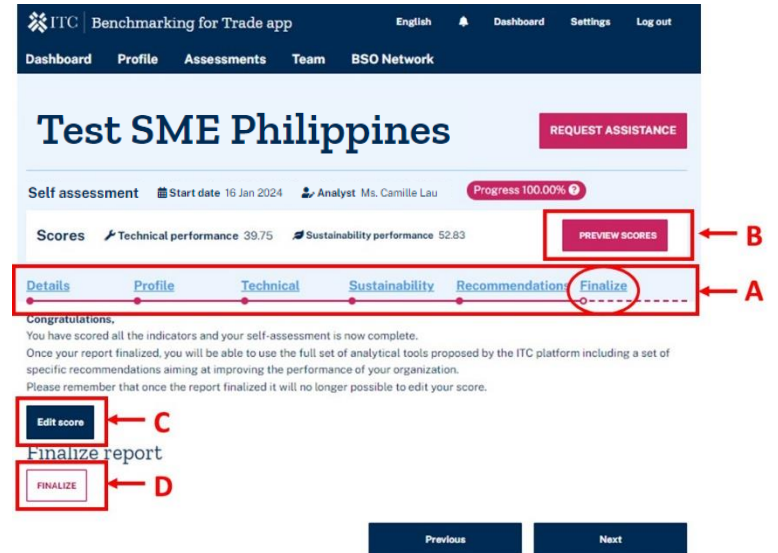
- You press "Next" to move to the "**Technical**" step (A). Here is where you conduct a technical assessment of the company's capabilities. You will assess four Competences (Strategy, Marketing, Production, and Resource Management) and the Capabilities that constitute those Competences.
- The Competence under assessment is highlighted in blue (B). You also have information about the progress in the assessment of the Competence and the score for the Competence.
- For each Competence and its constituting Capabilities, you will be presented with a question or a statement that you will have to answer using a 5-level Likert scale (C).

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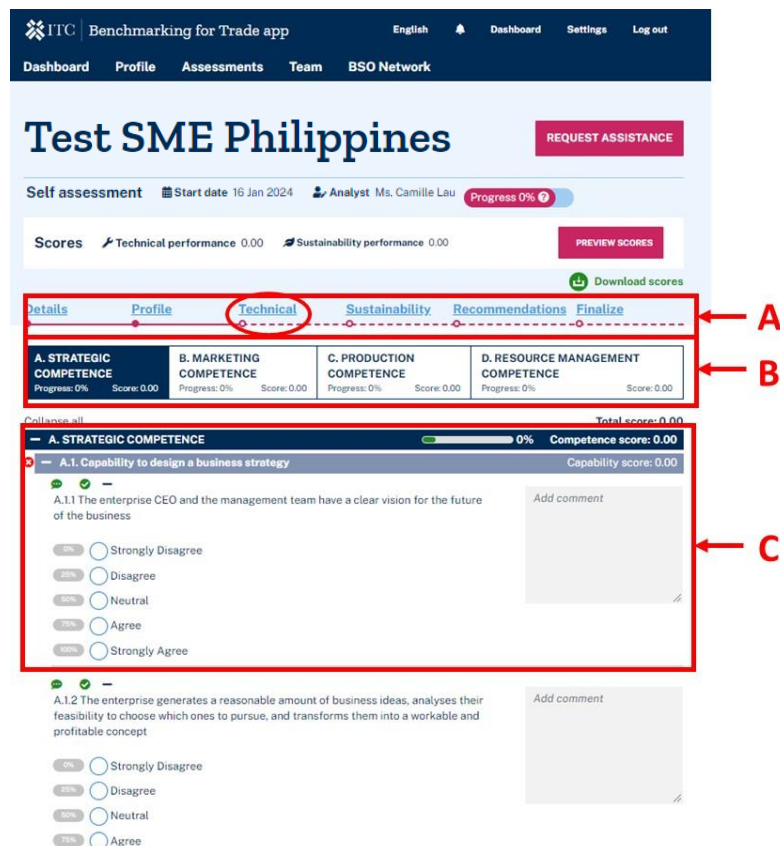
- Once you complete the assessment for each Competence, you will move to the next by clicking on "Next".
- After you complete the technical assessment, you will be asked whether you want to conduct a sustainability assessment.
    - If you wish to do a sustainability assessment, press "Yes" and you will move to the "**Sustainability**" step in the process.
    - If not, press "No". You will be directed to "**Recommendations**".

- These recommendations are automatically generated by the platform based on the answers you provided and will appear in the assessment report.
- The "**Finalize**" step is the last step in the assessment process (A).
- Once you finalize the assessment you will no longer be able to make any changes.

- Before finalizing the assessment, you could look at the scores (B) and based on what you see and your analysis of how well they reflect the situation of your company, you could decide to finalize or edit the assessment.
    - If you want to review your assessment, you can do it by clicking on "**Edit score**" (C). You will be sent to the beginning of the technical assessment.
    - If you are happy with your answers and the results obtained, you can press "**Finalize**" to close the assessment (D). No further changes will be allowed after this. A warning message will be displayed.

- Once you finalize the assessment you will be able to **download** an automatically generated self-assessment report (A).
- By clicking "Next" you will be able to view your scores (B).
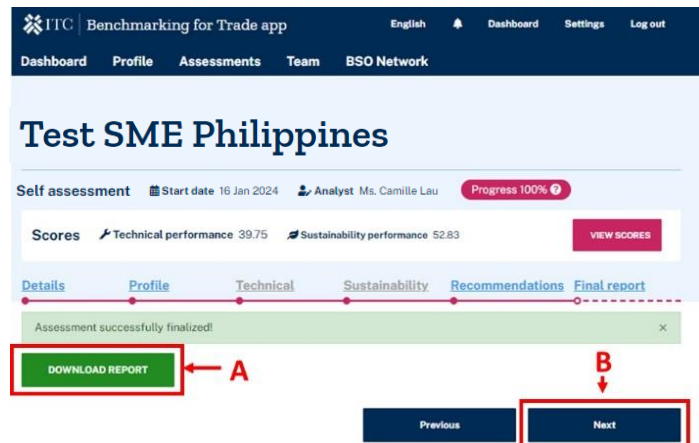
STEP 7: Review scores

- When you enter the **Review Scores** page you will be able to find your company's technical and sustainability aggregated scores (A).
- The first drop down menu allows you to select between "Technical scores", "Sustainability scores" or "Other drivers of performance" (B).
- You have different levels of granularity in the presentation of scores. For this, you select the Competence and Capability you are interested in analysing (C).
- Scores will be presented in graphic (D) and table (E) format.
- In the graph presentation (D) the pink area represents the score of the company. The blue, black and green lines represent the minimum, average, and maximum scores in the database. These minimum, average, and maximum scores are calculates taking into consideration all companies in the database irrespective of their size, sector, export orientation, or geographical location.
- In the table presentation (E) you get the same information. The "SCAN score" reflects the score of your company.
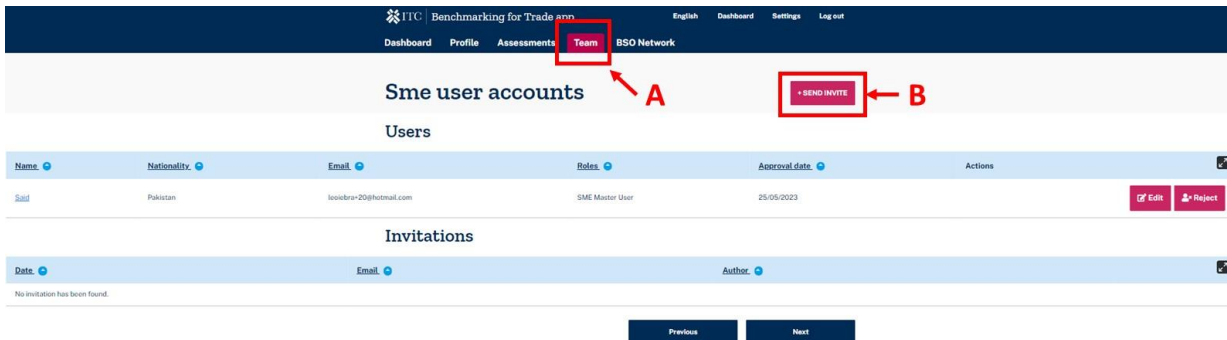
- You can also look at your company's Sustainability score and at score on other drivers of competitiveness (A). These drivers are: Corporate Culture, Digital Transition, and Exports.

STEP 8: Invite new users to the platform.

- If you want, you can invite other users to join the platform and have access to your company's information and assessment results.
- To do this, go to the "**Team**" tab (A) and press on "+SEND INVITE" (B).

- A pop-up window will open, and you will be asked to provide the email of the person you want to invite and define a role. You have three options:
  - SME Master User: Has maximum rights and no limitations.
  - SME User: Has access to all information but cannot conduct self-assessment or contact BSOs.
  - SME Analyst: Has access to all information and can conduct self-assessments but cannot contact BSOs.

  Once all information is completed press "Send Invitation". An automatic email will be sent to the email you provided with an invitation to join the platform.

Should you have any queries, do not hesitate to contact Ms. Valentina Saponara at *vsaponara@intracen.org*