

AMBIENT ASSISTED LIVING (AAL)
JOINT PROGRAMME

ICT-BASED SOLUTIONS FOR SUPPORTING OCCUPATION IN LIFE
OF OLDER ADULTS

D5.3 Go-to-market guide

Project acronym: **ActGo-Gate**

Project full title: **Active Retiree and Golden Workers Gate**

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CHANGE HISTORY

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TERMINOLOGY & ABBREVIATIONS

To assure coherent terminology and abbreviations across all documents inside the project, the specific terminology and abbreviations for this deliverable should be written here.

AAL JP	Active and Assisted Living Joint Programme
AGG	ActGo-Gate
BEI	Business Engineering Institute St.Gallen
CEO	Chief executive officer
CV	Corporate volunteering
CSR	Corporate Social Responsibility
E.g.	Example given
ERP	Enterprise Resource Planning
EZ GAW	Entwicklungszentrum Gut altwerden
FTE	Full time equivalent
NGO	Non-governmental organization
NPO	Non-profit organization
SEO	Search engine optimization
UI	User interface
WUE	Wroclaw University of Economics

EXECUTIVE SUMMARY

This Go-to-Market Guide is strongly resting upon the findings during the field evaluation interviews as well as on other dissemination activities and feedback received. Thus, the business model focusses on a ready-to-use software solution to support the management and operation of volunteering platforms in various and flexible settings. The pricing models are based on the number of users registered on the platform and the software promises a contemporary online appearance. It features cost savings through self-service of users as well as efficient and modern coordination of any sort of voluntary work, projects and match-making. The business case calculations and estimated costs of marketing as well as other possible barriers are assessed, a roadmap to market success and the business to break even after 22 months are outlined. Lessons learned from the field evaluation interviews are the preference of a technical-oriented platform (self-control of content and direct end-user communication), an existing buying interest for the reason of a unique selling proposition resulting in pricing packages with monthly fees starting from less than 100 €, and feedback to open up the platform for younger voluntary workers in the future.

1 INTRODUCTION

The ActGo-Gate Go-to-market guide presented in this deliverable devises the project's plan to monetize the project outcomes as a software product. For this reason, we will describe what the ActGo-Gate software actually is and what problems it addresses. After presenting the project partners briefly, we will have a closer look at the findings coming from the business model field evaluation: what are business model building blocks, the targeted market and how can it be exploited. Therefore, we will describe the resulting product in detail, explain possible barriers and their solutions, set up a check list for customers such as public institutions interested in implementing their own ActGo-Gate platform and present our findings to attract end-users as well as calculate the estimated costs of marketing measures. Finally, the dissemination report and outlook provides information about activities and their first results.

This deliverable will be developed based on the findings regarding business models in deliverables D5.1 Findings regarding business models and D5.2 Exploitation and dissemination plan for the project outcomes as well as in D3.2 Draft Business Plan. Thus, it will help to engineer the ActGo-Gate business model presented in D2.4 Final business plan and model.

2 ACTGO-GATE PROJECT DESCRIPTION

ActGo-Gate inspires and enables people to get involved in social activities, voluntary work and micro-tasks by providing them with easy-to-use ICT-supported solutions. The aim is to increase transparency of demands and offerings in social marketplaces, allowing for flexible and self-determined participation. The efforts aim at strengthening social ties and mutual support as well as improving quality of life.

Three occupational modules support different forms of social participation by older people and will be piloted within the project:

- The “Serve the community” module enables customers to participate by offering their informal support to other community members (informal volunteering work).
- The “Flexible occupation” module brings together local service providers with golden workers and active retirees, who want to engage in part-time jobs and occupations.
- The “Get involved with organizations” module aims to bring together people for social projects, e.g. as part of corporate volunteering programs.

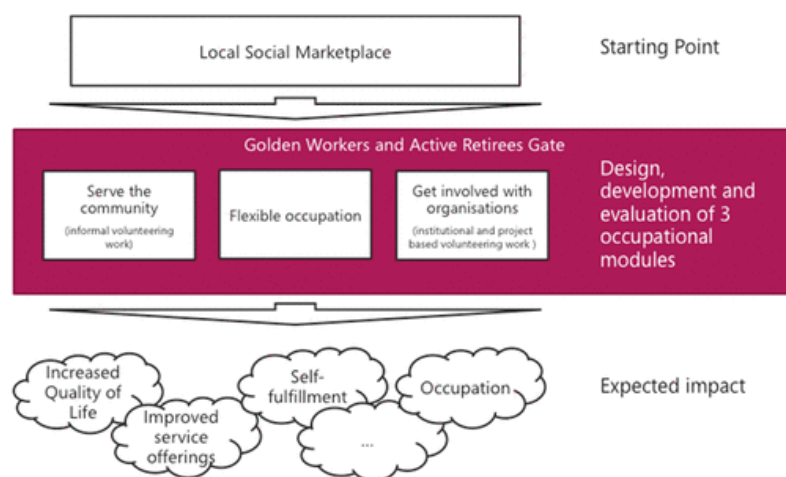


Figure 2-1: Project Overview

The ActGo-Gate platform is aimed at being a central intermediate for occupation and participation possibilities with a wide functionality coming from various connected modules (apps with separate offerings). It will be the first of its kind to provide a single point of access to a comprehensive range of occupational possibilities (voluntary, paid, task-based, project-based, etc.). The ActGo-Gate will offer tools for efficient transactional occupational operations (coordination of appointments, job searching and matching, customer feedback and quality assurance, documentation, reporting etc.), both for professional as well as informal activities. Therefore, the application will provide operators efficient management of local volunteering and end users with easy access to this integrated gate to enable them to offer their skills, abilities and experiences to other community members or companies.

The problems addressed by the integrated software solution and possible benefits to platform users are described in Table 2-1:

User group	Indirect, non-financial benefits
People looking for (volunteering) work	<ul style="list-style-type: none"> ● Self-fulfilment ● Purpose in life ● Self-esteem ● Feeling good because of doing good ● Social contacts and relationships ● Comprehensive base of different opportunities to get involved, making it easier to find an offer fitting personal interests, competences and capacities
Companies/organizations looking for volunteers and/or workers	<ul style="list-style-type: none"> ● Easy access to broad network of potential employees / volunteers → better chances to find the right one ● Flexibility through easy access to a pool of available human resources, also at short notice ● Reputation as a “socially responsible” company, e.g. for providing job opportunities specifically for older adults
Companies participating as service providers	<ul style="list-style-type: none"> ● Customer access ● Operational support in daily business (e.g. scheduling appointment, invoicing etc.) ● Reputation as “committed to the local community”
Companies using ActGo-Gate as a corporate volunteering platform	<ul style="list-style-type: none"> ● Public awareness
Companies acting as channel partners (organisations that make the integrated service offerings of the ActGo-Gate available to their customers as a branded solution)	<ul style="list-style-type: none"> ● Easy implementation of innovative service concepts for their customers → low investments, reputation as innovative company, reputation as customer-centred and/or “socially responsible”
Communities where the ActGo-Gate is implemented	<ul style="list-style-type: none"> ● Better integration of professional and informal services ● Attractiveness as a consequence of comprehensive support and commitment of the inhabitants, good social structures ● Reputation as a caring and innovative community
Individuals benefitting from the integrated service portfolio of professional and informal services	<ul style="list-style-type: none"> ● Improved, more comprehensive service offerings ● Quality of life

Table 2-1: User groups and benefits

3 BUSINESS MODEL

In 2017 several interviews with potential customers took place. The results of these personal meetings are presented in detail further below. All full interview sheets of the field evaluation can be found in the appendix of this deliverable.

The interview sheet was designed to support the set-up of a business model canvas for the integrated gate application (see also deliverable D5.2). The following findings summarize the answers of the interview partners in order to develop the business model building blocks:

Key Partners

- Software development (Clavis IT und Wroclaw University of Economics)
- Social and end-user organizations (Alsterdorf Assistenz Ost und Entwicklungszentrum Gut altwerden)
- BENEVOL St. Gallen
- Business Engineering Institute St. Gallen

Key Activities

- Set-up and development of the ActGo-Gate platform
- IT services and hosting
- Technical support
- Customer relations and trainings (on-site or computer-based)
- Marketing and sales of the software

Value Proposition

Most interviewed persons prefer a technical-oriented solution meaning operating a platform their selves (content, end-user support and marketing). The reasons are closer and direct communication with end-users and better trust and confidence building through local involvement. This will help us to concentrate our business operations on the development, dissemination and technical support of the software.

ActGo-Gate offers communities and social organizations a software solution to set up and manage local volunteering online platforms. In contrast to other solutions the ready-to-use software offers small formation fees and calculable monthly costs. The modules allow different illustrations and self-service to serve the community, get involved with organizations as well as flexible occupations to cover match-making of job offers, social projects, personal demands and service providers.

Customer Relationships

Customers interact with ActGo-Gate though a direct contact person: e-mail for technical support and telephone with sales person for personal contact. We are aiming for long-time relationships with our customers acting as local operators and multipliers, after setting up

technical support as well as personal contact for lessons learned, possible technical upgrades and strategic partnerships will be established to promote customer loyalty.

Channels

- Personal contact and meetings
- Word of Mouth
- Online presence
 - Product website
 - Partner links
 - SEO and Google Adwords
 - Social media
- Accompanied by printed media advertisements

Key Resources

- ActGo-Gate platform
- Personal contacts to communities and volunteering organizations

Customer Segments

- Public Institutions (e.g. communities, municipal departments such as city administration, city quarter offices): This target group is aiming to improve the quality of life, interactions between generations as well as communal life.
- Social organizations (e.g. assisted living, NPO/NGO with local volunteering projects and management): This target group supports people in need with local voluntary work, services and projects.

Cost Structure

- Development of the platform
- Staff costs for sales, project management and technical support
- Marketing costs
- IT costs (Hosting fees for ActGo-Gate instances, e.g. Amazon Web Services)

Revenue Streams

There will be a set-up fee for new platforms of the ActGo-Gate software as well as monthly/quarterly/yearly fees. The fees rely on the number of end-users registered and the number of organizations listing jobs/projects/services in all categories (three different price packages Small/Medium/Large). In addition, the development of upgrades or personal schoolings in the amount of 90 € per hour will be a further revenue stream. Based on the customer requirements later the listing of local organizations and the placement of advertisements could build supplementary revenues for the local operator as well as for the ActGo-Gate software company.

The findings and feedback from interview partners at the business model field evaluations can be summarized in the business model canvas illustrated in Figure 3-1:



Figure 3-1: Business model canvas (after field evaluation)

Based on the business case calculation in Deliverable D5.1 we assume the operative business to realize a profit within 15 months and to break even within 22 months. The assumptions made for this calculation cover four product sales per quarter meaning new local platforms for the integrated ActGo-Gate software. Initial set-up fees range between 6.000 € and 15.000 €, monthly license fees sum up to 1.000 – 2.000 € per year and customer depending on the number of end-users registered on the platform. The number of end-users affects our deployment costs and efforts for technical support, as well as some customers such as smaller communities have asked us to offer reduced pricing packages for their needs. Figure 3-2 illustrates the accumulated win/loss calculations in the time from 2018 to 2021, showing decreasing profits in the third year for the reason of one additional staff member in IT support and service being employed.



Figure 3-2: Win/loss accumulated

We are aiming for software sales to communities and municipal departments in the beginning as the most attractive market. If we will accomplish about four sales per quarter the operative business will break even in the fourth quarter of the second year. The product and pricing will

be described in detail further below in this deliverable and the description of the final business model can be found in deliverable D2.4.

4 PARTNERS

4.1 Project Partners

4.1.1 alsterdorf assistenz ost



Alsterdorf assistenz ost as a subsidiary of the Lutheran foundation Alsterdorf (Evangelische Stiftung Alsterdorf), Hamburg Alsterdorf was founded in 2005. The foundation offers special and professional social services and individual, inclusive solutions for different target groups to gain autonomy and overcome the barriers people with disabilities or needs for assistance when old have to deal with in our society. The target groups of end users are people with any kind of disability, mentally or physically, include older people with every kind of help needed and parents who lack basic facilities for educating their children. The social services contain every kind of support people want or need like housekeeping, babysitting, facility management, personal support, administration etc. There are a lot of skills, experiences and competences across the different companies at Evangelische Stiftung Alsterdorf and volunteers who enrich the professional system to develop services for people. In order to address its customers' demands, aaost needs a special kind of employees, golden age people who want to be busy and have got life experiences to do an excellent, flexible volunteer job. Within the new offer LeNa, created by SAGA and aaost, supported by plietsch and cooperating with Machbarschaft, new associations for people who either give help or get help, aaost supports the finding of solutions for civil engagement and answers demographic and financial topics.

4.1.2 Benevol St. Gallen



Founded in 2001, Benevol St. Gallen is a specialist unit for volunteer work. It's a service provided by the Swiss Red Cross Canton St. Gallen and is dedicated to support and foster the work of volunteers.

Benevol St. Gallen has become well-known for having realized the first platform for voluntary and honorary services in Switzerland. The platform enables other specialist units for volunteer work (in other cantons) as well as associations, municipalities and other organizations to publish vacant positions for volunteers all over Switzerland in different categories. These voluntary assignments can be short term in the context of an event or long term depending on the job. The platform is publicly accessible at rss.benevol-jobs.ch and currently offered in German and French.

4.1.3 Entwicklungszentrum Gut altwerden



The Entwicklungszentrum Gut altwerden GmbH is an independent development company, located in Sindelfingen, Stuttgart area. Our mission is to create and to bring to market innovative solutions, services and products to support organizations, companies, administration and people in how to handle the consequences of the demographic development. Especially we are running projects in the three areas: 1) Creating networks in communities and increasing the participation of its inhabitants; 2) Creating business models to support the citizens of communities with all kinds of services; 3) Creating programs to empower companies/ organizations as well as employees in the area of service orientation. Our focus is to increase the quality of life for the individuals. GAW is organized in project structure and is cooperating with a notable number of qualified and well-known partners (experts, universities, scientific organizations, commercial and social enterprises). This mode of operation enables us to collect the optimum of expertise to run our projects with minimized overhead costs. Practical relevance is the main driver for the development process in all our projects.

4.1.4 University of St. Gallen



The University of St. Gallen (HSG) is one of the top-ranked European business schools. It has constantly extended its network of exchange and cooperation agreements with internationally prominent business schools and universities in Europe, North and South America and Asia. In 1990, the University became a member of the CEMS. As the first German-speaking University, the University of St. Gallen has been accredited by the European Quality Improvement System (EQUIS) and since 2004 by the Association to Advance Collegiate Schools of Business (AACSB). The Institute of Information Management (IWI-HSG) at the University of St. Gallen was founded in 1989. The institute mainly conducts applied research in the field of information management and business models for the information age. It has excellent knowledge and experience in Business Networking, Business Models, Business-IT-Alignment, and Software Engineering.

4.1.5 Wrocław University of Economics



The Wrocław University of Economics, Institute of Business Informatics (IBI) is engaged in research in information systems, software engineering and information technology. Being the largest Institute of this kind in Poland, the research reflects a wide range of staff and students' interests and includes: systems engineering and management, service science, e-business,

artificial intelligence, decision support systems & business intelligence, knowledge management, effectiveness of IT investments, IS security, societal challenges, and e-government. Currently, the Institute's main business domains for research include ambient assisted living, logistics, smart energy, and knowledge management. Research activities at WUE have strong international footprint stemming from earlier international appointments of some of its professorial staff (mostly Australia, France, and Germany). Currently the Institute of Business Informatics employs over 40 academic staff, including nine professors. It has four departments: Information Systems, Business Intelligence Systems, Information Technologies, Knowledge Management.

4.2 B2B Project Partners

4.2.1 Business Engineering Institute St. Gallen AG



The Business Engineering Institute St. Gallen AG develops innovative business solutions for a variety of different industries. BEI has a strong track record in finding and implementing (software development and organizational implementation) solutions to practical problems through cross-enterprise and enterprise-research collaboration in so called Competence Centers, following the methodological approach of Business Engineering. For the last 1.5 years BEI has developed a productive prototype version of a service management platform, which aims at providing consumers with an individualized bundle of services to support their quality of life. This platform is based on a standard ERP system, which was extended to serve the specific needs of service intermediaries, and is interconnected with mobile solutions for older consumers and mobile apps for service providers. This productive prototype will be brought to the project, tested in the first pilot run and further developed according to the requirements derived from the iterative piloting.

4.2.2 clavis IT



Since 2001, clavis IT ag has concentrated on the development, implementation and integration of high-quality software solutions. The focus is on the mission-critical core processes of our customers. Broad technology competence, high implementation competence and comprehensive supervision competence form the basis for successful and secure software solutions. As a full-service provider, clavis IT offers everything from one source in web projects, from the consulting to the project handling, introduction and integration to the operation and maintenance of the system environments. In the domain of public and corporate volunteering, clavis IT and Benevol successfully cooperate since 2010.

5 DEFINITION OF PRODUCT AND MARKET

5.1 Product and Place

The product is available as hosted web application. The ActGo-Gate platform has to meet a wide range of functional and non-functional requirements, that influence its final shape. They can be divided into five groups:

- Functionality (capability to answer functional requirements, security / data safety, reusability)
- Usability (same look & feel, good user guidance, responsive behaviour)
- Reliability (stability, failure frequency, accuracy, actuality)
- Performance (response times, resource consumption / efficiency)
- Supportability (scalability, testability, ability to distribute, modularity, loose coupling)

The user interface provides necessary interfaces for managing user account, as well as for processes of registration and logging in. It contains all forms and dialog boxes that appeared during the realisation of the particular process.

The user interface also contains a rich informative section that will provide the necessary information about the gate itself, a promotional video as well as rich system documentation for users: user guide (a handbook), FAQ section etc. All the information should introduce the user into the system in a way that he or she will be able to use it without an assistance of the third party. The design of the landing page is presented on the next page.

The software offers everything that is required for implementing appealing service marketplaces promptly and easily. As ActGo-Gate is provided as a hosted service that can be accessed via every internet browser as well as via mobile devices, customers do not need to worry about technical details. The main features include:

- Responsive design and barrier-free website
- Easy and intuitive navigation of the website
- User groups and admin-users e.g. for municipalities, companies and event organizers
- Access protected by password for both consumers and local organizations
- Voluntary job market (institutional work) and social projects, e.g. as part of corporate volunteering programs
- Service catalog displaying local demands and services provided by volunteers
- Different appointment coordination processes (direct booking, request with or without date suggestions, rescheduling, etc.)
- Calendar view of all appointments, also covering integration with standard calendar systems, e.g. MS Outlook (via ICS feed)
- Messaging function that enables easy communication between organizations, service providers and consumers

The screenshot shows the landing page for 'Nachbarschaft Hamburg'. At the top, there's a navigation bar with 'ANZEIGEN' and 'ANMELDEN' buttons, and a language selector set to German. The main header features a large photo of a diverse group of people with the text 'Moin, Moin!' and 'Werden Sie in der Nachbarschaft aktiv!'. Below this is a link 'MEHR ÜBER DAS PROJEKT LESEN'. The main content area is titled 'Nachbarschaften oder Kartenansicht' and shows a map of Hamburg with a red highlight on 'Quartier Rungestrasse'. Below the map is a search bar with the text 'Anzeige finden' and 'Suchen Sie nach etwas spezifischem?'. A testimonial from two women is featured, along with a grid of icons for various services like 'TIERE & PFLANZEN', 'HAUSHALT & HANDWERK', 'MUSIK & KULTUR', 'ESSEN & TRINKEN', 'COMPUTER & TECHNIK', 'BEWEGUNG & GESUNDHEIT', and 'FESTE & VERANSTALTUNGEN'. The footer contains navigation links and a user profile section.

- The landing page for end-users is divided into three functional access points, providing modern usability standards such as responsive design and scroll-down modus operandi.

- Below the picture and information sector (can be edited by every platform operator as well as menu colours) a neighbourhood/map view provides the first access point to volunteering work:

- Clicking a neighbourhood leads to the neighbourhood's own subpage (see figure 2-2).

- Search function: Convenient access to listings in demands, jobs and services and a filter for different neighbourhoods.

- Some local personal examples and testimonials will help to understand the benefits and content of the platform as well as to inspire confidence for new users.

- Finally, the third access point to the functionalities will be provided via a common catalogue section. Selecting a category as well as clicking "show more" will open the catalogue subpage with many search features such as distance.

- The footer is designed to support users with answers to general questions about the platform's functionality, privacy policy and a personal local contact person to build adequate confidence.

ActGo-Gate is able to provide as many subpages as the customer will require for his needs. When selecting a subpage, its own page will open and only services, demands and jobs linked to this instance (e.g. neighbourhood, community) will be displayed to the user. As well as on the homepage the following content is editable by customers their selves when operating the platform:

- Background image and menu colours
- Title and subtitle, e.g. for news
- Footer content

The ActGo-Gate is built to be a solution that is an entry point for the search for occupation for Active Retiree and Golden Workers. Based on the location of the end user the platform can offer different modules and services that are available for the end users. In this way, the platform allows an end user to search for the right offer. Depending on local availability different offers are included in the search.

The modules take over the tasks that are directly connected to the mediation of occupational activities. They have a specific type of module, a fixed geographical expansion as well as service or application-specific features. These definitions of the modules and services allow a connection and offer the possibility to find the different offerings in catalogue. This classification of new applications and services allows a differentiation from the existing modules, applications, and services and thus offer a unique positioning.

If customers want to provide their end-users (e.g. inhabitants, citizens, tenants) with a convenient access to local volunteering, they can start off immediately. We set up the system, and they merely need to specify provided catalogues and colour design. The defined editable text fields can be changed by customers at any time. We are happy to assist with this task as well. From a technical perspective, the only requirement is an e-mail address as each customer request is sent to customers additionally via e-mail. All users can handle requests and appointments directly from the email (e.g. confirming appointments, declining requests, suggesting an alternative date, etc.), thus it is not necessary to log in additionally to the platform. Many additional features are available as an option, e.g.:

- Integration of further service providers into the service offer (you can decide whether your customers can contact those external providers directly or whether you want to take care of the coordination process)
- Dispatching, i.e. the assignment of the different customer requests to employees
 - Employees have direct access to the platform and are enabled to act independently, e.g. to contact the customer in the event of a delay
- Confirmation of service provision and documentation
- Integration with ERP systems for invoicing the services
 - By request, we provide fully configured integrated solutions

The integrated platform as a product is aiming to support those institutions that provide, organize and manage volunteering work especially for older adults in local social environments. Therefore, we can identify two main customer groups:

- Public institutions, such as:
 - Small- and midsize communities
 - Departments of large municipalities
- Social organizations, such as:
 - NGOs engaged in voluntary work

- NPOs focused on local neighborhoods and volunteering
- Real estate developers with focus on older tenants, including living services or assisted living facilities

As primary markets, we assign a primary ranking to the DACH countries (Germany, Switzerland and Austria, see also deliverable D5.1).

We are happy to assist local operators with special features such as the personal customer address book (PCAB) developed during the project (and now available for all customers). PCAP offers users making appointments for third persons a technical assistance to easier manage their clients' addresses:

The screenshot shows the 'LebensQualität' website interface. At the top, there is a navigation bar with 'FAVORITEN', 'KATALOG', 'KALENDER', and 'TERMINE'. A search bar is on the right. The main content area is titled 'Einen Termin vereinbaren für: Testservice'. It features a sidebar with a 'Testservice' card. The main form has the following fields:

- Name ***: Frank Jenisch
- Telefon #1**: 071 987 65 43
- Heimatadresse ***: Gubelweg 9, 9010 St.Gallen
- Telefon #2**: 0800 123 456
- Zieladresse ***: Dr. Hillfiger, Linsebühlstrasse 2 (bei Migros Spisertor)
- Rückfahrt erwünscht ?

Buttons include 'Löschen', 'Speichern', 'Zum Adressbuch hinzufügen', and 'Weiter'. A date/time selector at the bottom shows 'Datum: Freitag, 3. März 2017 10:00'.

Figure 5-1: Personal customer address book

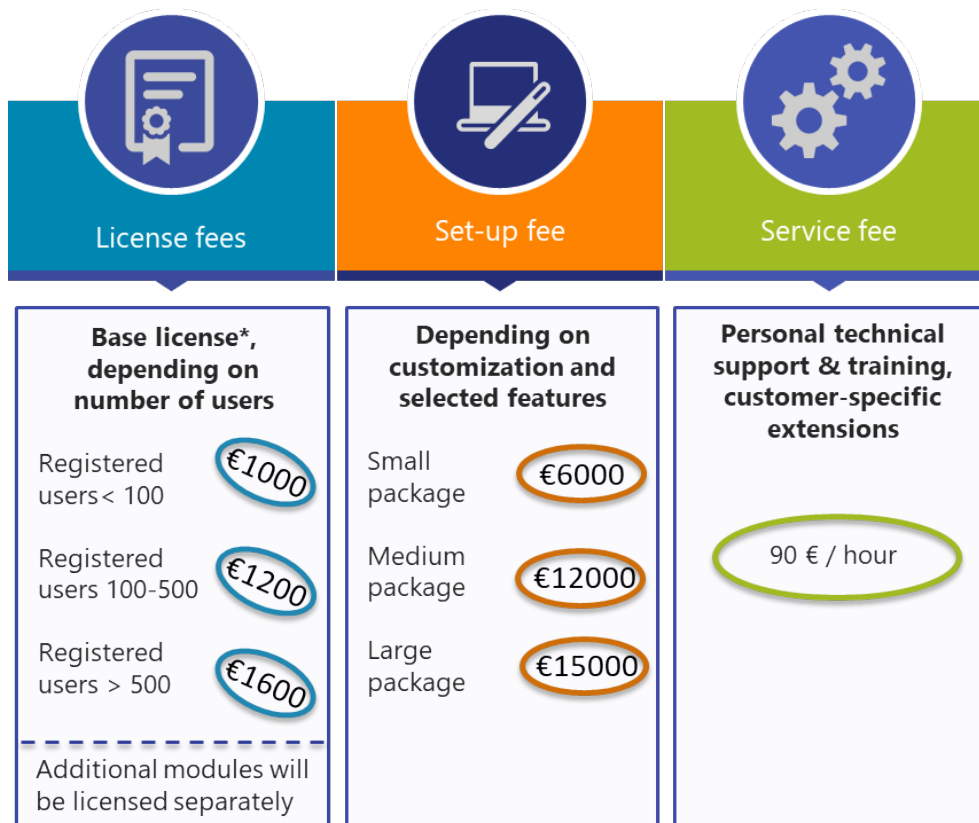
With the new feature as many personal contact information as needed can be saved and adjusted by the users, each user has its own PCAB covering the following fields:

- Name of client
- Home address
- Target addresses for periodical drives (such as a physiotherapist visited every two weeks)
- Two phone numbers
- Checkbox (for the driving service the need for a return journey can be submitted)
- Besides the PCAB functionalities all other appointment coordination fields such as date and time of the service are available

With similar developments, we are aiming to further and more specific support all institutions and organizations working to improve the daily life of people in the need for help by the best volunteering software in the European IT market.

5.2 Price

The following pricing packages will be offered to communities and social organizations:



* The base license includes the ActGo-Gate web application including the two modules "Flexible occupation" and "Serve the Community"

Figure 5-2: Pricing

The number of registered users on the platform also affects our hosting fees. For this reason, we decided to offer three different packages for the base license¹, the cheapest with only 1000€ per year (less than 100€ per month) aiming to also attract smaller communities or organizations. For the set-up fee the level of customization and selected technical features has to be discussed with customers to be able to make an attractive and binding offer, e.g. additional SMS notifications occasioning costs to us will not be available in the smallest package.

¹ The base license includes the ActGo-Gate web application including the two modules "Flexible occupation" and "Serve the Community", as these components are owned by the "ActGo-Gate organization" driving the go-to market (cf. 6 Organizational Structure for Go-to-Market). Additional modules, including the "Get involved with organizations" module as well as future modules to be integrated with the ActGo-Gate, will be licensed separately.

5.3 Promotion

The most important promotion measures are (see also D5.2):

- Product website
- Partner links
- Google AdWords
- Design
- Flyer/brochures
- Networking
- Workshops and events
- Multi-channel ads and campaigns

All marketing measures are aiming to communicate our advertising messages:



Figure 5-3: Advertising messages

To explain the messages in a brief and attracting way a short promotion video was drafted and can be found at <https://www.powtoon.com/c/fhDV2ztjg4u/1/m> (working best in Internet Explorer). The current video is in German and not yet finalised to become a part of the product website.

5.4 People and Processes

In our business case calculations (see also deliverables D5.1 and D5.2) we have defined a minimum of three employees for a successful formation of a new company that sells and provides the software. The main tasks and qualifications coming from our deliberations are:

- Two full time equivalents for business operations
 - CEO and project leadership
 - Sufficient education in business administration/finance/economics
 - Practical experience as business executive or chief executive officer (preferably in the area of information management including knowledge/experience in project implementation)
 - Sales, CRM and project management
 - Adequate knowledge in marketing planning/management/controlling
 - Hands-on experience for various marketing tools and instruments
 - Customer acquisition: practise and/or self-awareness to hold a great number of talks and to convince potential customers
 - Experience and/or strong interest in customer care
- One full time equivalent for IT (2 FTE from the third year on)
 - IT support and office
 - Advanced IT education and programming skills
 - Experience and/or strong interest in customer relations (at least English speaking) and development planning
 - Hands-on experience in software testing and project implementation

Therefore, we are able to categorize key sales processes to market and deliver our product:

- Pre-sales: lead generation and personal talks by sales employee, accompanied by the aid of all marketing instruments as well as marketing controlling of used tools
- Sales: product delivery usually done without the customer being present (personal contact when platform is online, PDFs with How-to guides and login data)
- After sales: customer relations (sales & IT staff), overall project management by CEO

The progress of our staff activities and exploitation planning is summarized in Figure 5-5:

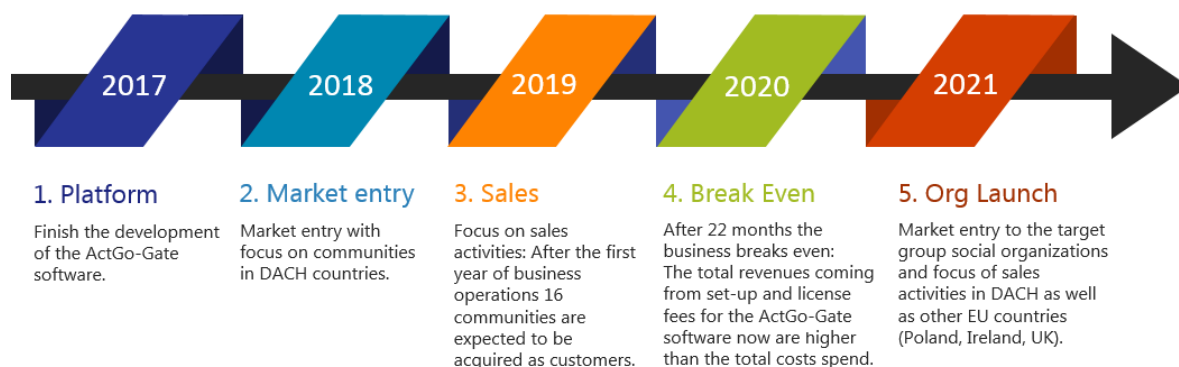


Figure 5-4: Activities and progress

5.5 Physical Evidence

During the project the integrated gate application was implemented in Hamburg used by the neighbourhood “Rungehaus”. This is the “final product” delivered to customers and hosted on our servers, also comprising information brochures and material (PDFs). As an example for the physical elements for a local platform, “Rungehaus” subpage is illustrated in Figure 5-6:

The screenshot shows the 'Nachbarschaft Rungestraße' subpage. At the top, there is a navigation bar with links for 'Nachbarschaft wählen', 'Angebot od. Gesuch eintragen', 'Hilfe', 'Ansicht anpassen', and a language selector. Below this is a pink header with 'Nachbarschaft Rungestraße' and sub-links: 'Über uns', 'Aktuelles', 'Pfliegewohnung auf Zeit', and 'Nachbarn für Nachbarn'. The main content area features a large photo of the building with the text 'Herzlich willkommen in der lebendigen Nachbarschaft Rungehaus.' and a notice: 'Nicht verpassen: Weihnachtsfeier am 18.12.2016 im Gemeinschaftsraum'. Below the photo is a section for 'Nachbarschaftliches Engagement' with radio buttons for 'Ich biete...' and 'Ich suche...', a search input field, and a 'Finden' button. A 'KATALOG' button is also present. The 'Anzeigen im Katalog finden' section displays a grid of icons for various activities: 'TIERE & PFLANZEN', 'HAUSHALT & HANDWERK', 'MUSIK & KULTUR', 'SPIELEN & KLÖNNEN', 'ESSEN & TRINKEN', 'COMPUTER & TECHNIK', 'BEWEGUNG & GESUNDHEIT', and 'FESTE & VERANSTALTUNGEN'. The footer includes links for 'Über uns', 'Unsere Partner', 'Nutzer', and 'Leistungen', along with contact details for the neighborhood and a 'Kontakt' button.

Figure 5-5: Rungehaus subpage

The integrated ActGo-Gate application can be visited online at: <https://nachbarschaft-hamburg.de/de> & <https://nachbarschaft-hamburg.de/de/neighborhood/quartier-rungestraesse>

6 ORGANIZATIONAL STRUCTURE FOR GO-TO-MARKET

Business Engineering Institute St. Gallen AG and Wrocław University of Economics are currently (as of November 2017) negotiating the details to combine their Intellectual Property Rights regarding the integrating Gate application as well as the Amiona Marketplace, which forms the basis of the “Flexible Occupation” as well as the “Serve the Community” module, in a new joint organization. This newly founded organization (as the name is not yet finally decided, we will use “ActGo-Gate organization” thereafter), most likely set-up as a Swiss Aktiengesellschaft with its registered business address in St. Gallen, will not only drive the go-to-market for the ActGo-Gate solution but also ensure further development of the application. Hence, its main areas of activities will be:

- Acquisition of customers interested in running instances of ActGo-Gate and connected modules
- Project business to set up these instances and to implement additional, customer-specific features / implement customer-specific adaptations (→ one-time revenues from set-up packages and customer-specific adaptations/extensions based on efforts)
- IT operations to host the instances of ActGo-Gate and connected modules (→ recurring revenues from hosting fees)
- Training and support (→ on-time revenues based on efforts)
- Product development to constantly improve the solution

Luckily, people involved in the project from the University of St. Gallen’s Institute of Information Management have already expressed their interest in joining the ActGo-Gate organization as business development experts after completing their PhD.

clavis IT and Benevol St. Gallen, owners of the intellectual property rights regarding the “Get Involved with Organizations” module will concentrate on their solution but become a preferred supplier for the ActGo-Gate organization. For any instance of the “Get Involved with Organizations” module connected to an ActGo-Gate instance clavis IT / Benevol will earn

- periodic license fees,
- hosting fees, if hosted on clavis IT infrastructure,
- one-time set-up fee for the module (in particular adaptations to the customer’s UI; percentage of the overall set-up fee to be paid by the customer, cf. chapter 5.2),

whereas the ActGo-Gate organization will benefit from

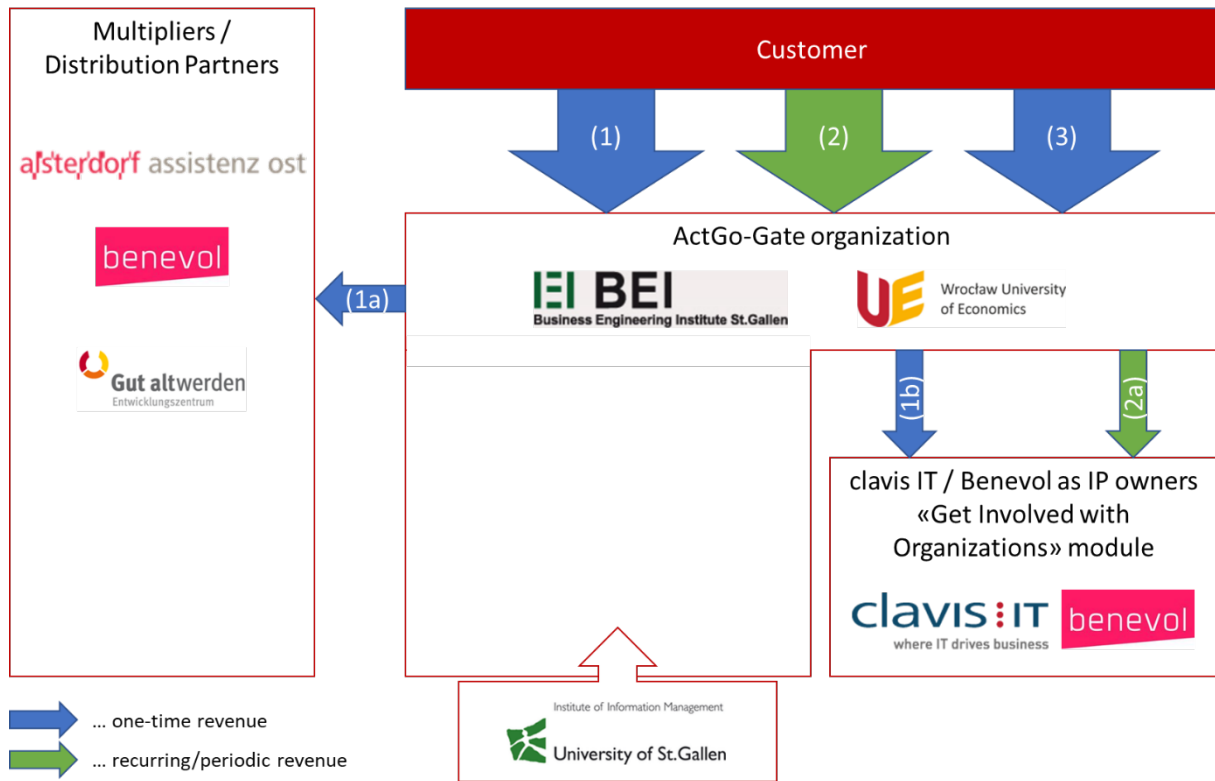
- one-time set-up/integration fee (part of the overall set-up fee to be paid by the customer),
- periodic hosting fees, if hosted on ActGo-Gate organization’s infrastructure

End-user organizations from the project, Alsterdorf assistenz ost, Benevol St. Gallen, and Entwicklungszentrum Gut altwerden, will all act as multipliers / distribution partners for the ActGo-Gate organization, committed to perform the following activities:

- actively promote the ActGo-Gate solution within their network of similar organizations and other parties, which might be interested in the solution
- allowing interested parties to visit them on-site and showing their installations of ActGo-Gate and/or modules to potential customers
- sharing their first-hand insights regarding benefits for users and the communities with interested parties

These efforts will be rewarded by a one-time payment per customer, calculated as a percentage of the one-time set-up fee + fees for customer-specific extensions/adaptations to be paid by the customer.

The following illustration shows the intended organizational structure for the go-to-market as well as revenue streams.



(1)	One-time payment for set-up + customer-specific extensions/adaptations
(1a)	Reward to partner who has helped to win the customer, percentage of (1)
(1b)	One-time set-up fee for “Get Involved with Organizations” module, percentage of (1)
(2)	Periodic license fee
(2a)	Periodic license fee for “Get Involved with Organizations” module, percentage of (1) dependent on where the module is hosted
(3)	One-time payments for training and support

Figure 6-1: Organizations structure for go-to-market and revenue streams

7 BARRIERS PREVENTING THE MARKET ACCESS

7.1 Possible barriers

Economies of scale

Economies of scale are declines in the unit costs of our software product as the absolute sales volume per period increases. They rely on our rather high staff costs and can be solved by coming in at a large scale (risking strong reaction from competitors) or a small scale (meaning a cost disadvantage).

Product differentiation

We are planning to bring a new, different product to market, but its benefits must be clearly communicated to the targeted customer groups. We must find effective positioning, which requires efficient and effective marketing measures.

The market for elderly users (aged 50-75) in some countries like Poland is not the same as in Switzerland and Germany: An evaluation pool executed by WUE showed mostly not sufficient computer skills for elderly people in Poland.

Investments for company formation

The financial requirements for human resources, IT infrastructure and marketing have been calculated in deliverable D5.1 and the formation costs sum up to 15.200 €.

Market entry barriers and switching costs

The regional, national and international access is not limited by governments since all targeted markets are within the EU single market, but we found limitations regarding the software language, which currently is available in German, English, Polish and Turkish.

Within the field evaluation no current standard software solution was identified that is used by communities to manage local volunteering. Instead of switching costs the vitally important set-up fees ranging from 6.000 € to 15.000 € might be a possible barrier for commercial success.

7.2 Solutions to the Barriers

Economies of Scale

For the reason of explaining and communicating the new software's benefits personal talks with potential customers will be required. Therefore, we will start with small scale sales activities in the amount of continually four sales per quarter. This will mean higher set-up fees that can be challenging, in the worst-case scenario we cannot establish these fees and have to switch to slightly higher licences fees without set-up fees. In this (worst) business case the break-even will only be possible within 43 months.

Product Differentiation

To communicate the advantages and long-time cost savings for potential customers, personal meetings in person are necessary, for this reason main investments are planned to build a successful marketing staff. In addition, several efficient advertising measures have been identified to disseminate and explain the product to target groups. These instruments and tools tot up to 6.000€ per year.

The feedback and evaluation of elderly users in Germany, Switzerland and Poland have led to the result to start sales activities in the DACH countries.

Investments for Company Formation

In the management case scenario, we are planning to depreciate and amortise formation costs within a planned period of 4 years meaning 950 € in every quarter. If no funding for this plan can be found the investment for the company formation will be 15.200 € in the beginning and has to be raised by all project partners.

Another option to save money considering only small resources in the beginning is to use all contacts and networks of AAO, BEI, BENEVOL, EZ GAW and WUE to find a sufficient number of customers in 2018, before raising the company formation costs. Given the business case calculations this would imply finding at least 16 customers within one year.

Market Entry Barriers and Switching Costs

To explore markets outside our software language we have prepared the software for an easy translation by using language sheets. These sheets could be delivered by professional translators. In addition, international business partners would be a great chance as we have assessed personal talks with target groups as absolutely important.

There is currently no entry barrier for software service providers regarding the European single market access and taxation issues. However, we have to keep a wary eye on the Brexit negotiations with the EU since an exploitation to the English market seems to be very attractive. In the beginning, a start in Ireland is an option, in order to receive feedback and evaluate the market potential.

As above-mentioned no current standard software solution was recognised that is used by communities to manage local volunteering. Nevertheless, switching costs can be defined concerning our set-up fees ranging from 6.000 € to 15.000 € and have to be valued by the quantity of successful product sales.

Time to Market

Having analysed all possible barriers and planning to finish the product development within the project until November 2017, the expected time to market to start selling the ActGo-Gate software to early adopters is scheduled in 2018, using personal contacts of all project partners to optimize personnel resources in the beginning and providing flexibility to still implement minor software and pricing adjustments.

8 APPROACH TO ATTRACT PARTNERS AND END-USERS

The findings from field evaluation interviews conclude that most customers/operators of the software prefer to communicate and disseminate the local volunteering platform to end-users their selves, but for the reason of supporting and consulting our business partners we executed several research and evaluation studies presented in the following chapters.

8.1 Flexible Occupation Module

8.1.1 Planungsaufe

Setting Information:

- 100 people were invited
- It was hosted at different topic tables.
- The facilitators were volunteers and professional staff of our partners

Participants:

- 60 seniors aged 60-90 years

The aim of this event was:

- To promote self-organization
- Form stakeholders for specific topics
- Find volunteers for the existing cooking group -
- Give room to possibilities of volunteer commitment in the immediate area to develop.
- The results were the basis for further processes of self-organization.

Developed following groups (self-organized):

- Bingo and Games 2 groups, gymnastics, yoga, singing, excursions.

8.1.2 LeNa Council

In the LeNa Council (inspired by the offer "Lively Neighbourhood - Lebendige Nachbarschaft") participatory structures for self-organization of activities is implemented in the RungeTreff and the neighbourhood assistance. The LeNa Council is made up of volunteers and other tenants from the neighborhood, visiting the various stakeholders and support them in their activities and ideas. This committee discussed ideas for further development of neighbourhood assistance. They schedule und evaluate self-organized educational and recreational events.

New volunteers can get to know the existing activities on the LeNa Council, ask questions and contribute ideas.

The LeNa Council is active since October 2015, once a month for 2 hours and has 14 members.

Organization of the "cooking group", which are volunteers that regularly cook lunch for other people.

This offer is aimed primarily at people who can cook alone without support not / want and on common meals looking at human contact.

Cooking together has particularly older people a great way to get involved. The commitment is meaningfully, fun and provide both the committed volunteers tasks and daily routines as well as the "guest" at lunch.

Contacts are expanded, new ideas, problems are detected quickly.

In the cooking group consist in involved 16 seniors.

Other volunteers have agreed to do cooking, activities in the volunteer office, and craft activities.

8.2 Get Involved with Organizations Module

8.2.1 Evaluation study with end users (2014)

Participants:

- Primary end users (volunteers): 1.021 persons per online questionnaire
- Secondary end users (NPO): 750 persons per online questionnaire and partially in person
- 408 NPOs that have used the platform in the past filled out an online survey, 15 NPO were additionally interviewed in a personal interview for quality purposes.
- 328 NPO that had not used the platform before participated in the online survey.
- 14 Benevol offices were interviewed in person.

Key areas of the survey included:

- Needs and requirements
- Price policy (usage fees)
- Search process for voluntary jobs
- Usability (e.g. post a job offer, CRM)
- Technical functionalities (e.g. system's speed)
- Marketing: Advertising, Campaigns, Brand awareness
- Matching: successful applications, matching information availability
- Traffic

8.2.2 Evaluation study end users (2016)

A second extensive end user evaluation was conducted in 2016. Again the FHSG was commissioned to design and conduct the survey.

Participants:

Primary end users (volunteers): 617 persons per online questionnaire

Secondary end users (NPO):

- 381 persons per online questionnaire and partially in person

- 364 NPOs that have used the platform in the past filled out an online survey.
- 17 Benevol offices were interviewed in person/per phone.

The same questions were asked in this round of survey to be able to compare the progress made within these two years. In addition to the previously asked questions new questions were added regarding new features, needs, and business model. These added questions were meant to assess the requirements of all users for further development of the platform.

Feedbacks from customer service department

The office in St. Gallen functions as the customer service desk and is the point of contact for all inquiries, questions, and technical issues for all user groups. All contacts are recorded in an Excel sheet by the Benevol team.

2015:

- Number of contacts with NPO: 340
- Number of contacts with volunteers: 457

The nature of contact is mainly technical or for general information. Technical issues are collected and forwarded to our IT partner via an issue tracking system. These issues are evaluated on a regular basis to find out how the user experience can be improved.

Qualitative end user studies

To obtain qualitative end user information we rely on the Benevol regional offices (Fachstellen) that play an important role. There are 19 Fachstellen and 5 partner offices that provide consultations and information to volunteers and NPO that work with volunteers. We profit from these exchanges and collect feedback based on their experience.

Fachstellen trainings

There are bi-annual courses/trainings for the Fachstellen employees where we work with real-life use cases from their daily experiences. We learn about the challenges of the primary and secondary users and use these findings for further developments.

Fachstellen exchanges

Regular experience exchanges between the Benevol offices take place where the platform is part of the agenda. Individual use cases are discussed and compared, requirements are submitted and needs are assessed. The Benevol employees have the opportunity to give suggestions for the development of the platform based on their experience in the field.

Fachstellen surveys

As secondary users, Fachstellen also play an important role as the customers of the platform. Once to twice a year, a satisfaction analysis is conducted to find out where there is room for improvement. These surveys are facilitated with the online tool "SurveyMonkey".

8.3 Serve the Community Module

8.3.1 Several expert interviews with heads of Stadtseniorenrat (SSR)

18-05-2015 First collusion about possible project engagement (SenM as possible use-case)

13-08-2015 Structuring of existing and future process

Coordination of technical possibilities and requirements

06-10-2015 Coordination about evaluation framework

Adjustment of indicators

21-10-2015 Further adjustment of indicators

Result: End-User Study-framework with questionnaires for drivers and customers

Semi-standardized questionnaires for the drivers

01-11-2015 Eight out of eleven active drivers filled out the questionnaire

Second round of adjusted questionnaires after pilot 1

Feedback on first developments at user training

04-03-2016 64 % drivers present

Additionally, Heads of SSR present

Informal feedback by drivers: At several occasions, there is the possibility to get in touch with the users and talk about their experiences so far.

8.4 Check List for Communities/Organizations

For the set-up of a new instance the following check list was developed in talks with potential partners and customers in order to assist efficient on-site talks and a quick realization of new platforms for all communities and organizations that are planning to buy and implement their own local ActGo-Gate software:

Topic	To-dos	Responsibility
Installation of the platform	<ul style="list-style-type: none"> • Design: selection of colours and logos • Catalogue and categories (continually extendable) 	The platform will be provided by us based on the layout wishes of the customer (only logos provided by customer)
Jobs, demands and service providers	<ul style="list-style-type: none"> • Contact data and agreements • Information material and events • Entering of initial and future offers 	Information material will be provided by us, initial offers will be entered for set-up. The collection of local contacts, information events and the entering of all later offers will be done by the operator himself and later by the users and organizations acting on the platform.
Local contact person	<ul style="list-style-type: none"> • «Monitoring» of the platform activities and troubleshooting • Introducing and expansion in line with demands 	Quality management and examination of demands as well as new offers shall be ensured on site, e.g. in cooperation with local organizations
Further development	<ul style="list-style-type: none"> • Range of functions • Workshops with operators/users to experience lessons learned from daily operations 	We are striving to develop the software steadily in regular interexchange with our partners to collect new ideas and improve the platform's usability

Table 8-1: Implementation check list

Estimated Costs of Marketing

The following Table 8-1 calculates the estimated costs of all marketing measures defined further up. They aggregate to 6.000 € per year coming from the following matters of expense:

Measure	Implementation	Price
Product website	Set up a good-looking and affordable homepage using standard software such as Jimdo (including SEO and 20 e-mail-addresses)	15 € per month, 180 € per year (JimdoBusiness)
Partner links	Links to project site on all partner websites (later add product website)	Free of cost
Google AdWords	Social organizations can apply for free accounts at Google for NPOs, a part of this volume shall be used for the AGG project site and later for the product website. Additional payed accounts can be used for specific product placements.	185 € per month, 2.220 € per year (for additional payed account)
Design	AGG-platform, logo and cover for flyers by graphic designer in Hamburg who also designed some parts of the platform such as categories	2.300 € (formation costs, offered to AAO)
Flyer/brochures	Printing a four A5-pages format containing: Attracting logo and picture, context of volunteering for "golden agers", benefits of using a standard software solution, company contact details and link to the project web site for further information	Printing a sufficient initial volume: 1.000 € Demand specific new prints: 100 € per month
Networking	Personal contact via phone and email with responsible persons (using XING or LinkedIn) at targeted groups' institutions in order to arrange personal meetings	Free of additional costs (One staff member for sales is required)
Workshops and events	All project partners will present the findings of the project including the resulted software whenever suitable and relevant	Free of additional costs (partners and sales staff)
Multi-channel ads and campaigns	Placement in journals and targeted ads in business apps such as XING or LinkedIn	200 € per month (=2.400 € a year)

Table 8-2: Marketing costs

The planned marketing activities require a minimum of 1 FTE for sales staff. Accumulated costs sum up to 500 € per month (=1.500 € per quarter in business case calculations).

9 DISSEMINATION REPORT AND OUTLOOK

9.1 First results

In 2017 we interviewed a series of potential customers in Switzerland and Germany. The feedback received was very positive and many showed great interest in buying the software once the development is finished at the end of the project:

- Sozialholding Mönchengladbach
 - Preferred solution: technical-oriented
 - Already started with the “Serve the community” module, interested in AGG software and talks about final product at the end of development
 - Aiming to support and illustrate all local care services, jobs and match-making of demands by people in the need for help
- City of St.Gallen, “Amt für Gesellschaftsfragen”
 - Preferred solution: technical-oriented (city has to control and ensure a platform with its name on it)
 - At the moment, no buying interest, but support to a group of organizations buying the software is possible
 - Partner should not be a profit-oriented company (e.g. BENEVOL would be ok)
- Sonnenhalde Tandem St.Gallen
 - Preferred solution: technical-oriented
 - Buying interest is strongly correlated to the pricing (and trustworthy reference partners using the software)
 - A social organization as contact partner is wished for better understanding of the own staff and for its confidence, but some technical support is needed
- “Nachbarschaftshilfe” Zurich
 - Preferred solution: technical-oriented (self-control of content is important)
 - To support neighbourhoods in Zurich a yearly fee of 600-1.000€ is affordable, maybe neighbourhoods can pay additional amounts for subpages
 - An extension of the target group of the platform to younger people would be the focus when operating the platform their selves
- Canton of Zurich, “Soziale Dienste”
 - Preferred solution: technical-oriented if full-service too expensive (just little resources to operate the platform)
 - Flexibility of the gate application covering the three modules is a great benefit

- Also younger people as end-users could be attractive, long-term engagement often deterrent, demands and one-time engagements could therefore be a very good approach
- Arche Zurich, "Kontaktstelle Freiwilligenarbeit"
 - Preferred solution: full-service (no knowledge in operating the platform)
 - Buying interest if there is a small pricing package available
 - Personal contact to voluntary workers for long-time engagements is important
- Pro Senectute St.Gallen
 - Preferred solution: technical-oriented (data of the 1800 voluntary workers at Pro Senectute have to be secured and already own applications operated)
 - Usability of the platform is very good and helpful, therefore buying interest in order to increase first contacts with new potential voluntary workers
 - Contact person out of professional social organizations within the project partners for quality and knowledge reasons
- City of Lucerne, "Soziale Dienste"
 - Preferred solution: technical-oriented (full-service interesting if there was no current public saving restrictions, also within the city higher human resources are available)
 - Buying interest mainly in "Get involved with organizations" module, other modules have to be discussed regarding personnel expenditure
 - Increase in volunteering organizations over the last few years, therefore an efficient and time-saving online platform would benefit everyone including the people in need of help
- Keppler foundation (Baden-Wuerttemberg)
 - Preferred solution: technical-oriented
 - Both target groups are relevant, local partnerships between public institutions and social organizations might be an interesting option (sales to both target groups together, divided payments)
 - Local partner for communication with end-users is key to build confidence and acceptance of the platform
 - Direct sales activities including personal talks with customers (local organizations and public institutions) are required to forge business partnerships and explain the software benefits to operative and IT personnel
- Alsterdorf Assistenz Ost
 - Preferred solution: technical-oriented (for social organizations)
 - The technical solution allows for more flexible, independent and controlled content management

- A monthly fee for organizations using the platform as a user would be helpful to financially assist the main operator of the local ActGo-Gate (e.g. a fee for every ten offerings registered at the platform)
- Personal talks with potential customers are very important to explain all benefit and functions of the platform: a local contact person within the network partners would be helpful, knowing the environment and challenges, as well as this person could connect with persons responsible for technical support

The field evaluation allows us to give a bright and positive outlook for attracting customers buying and operating the ActGo-Gate software. With appearances at fairs and talks in the personal networks we also started detailed negotiations with additional neighbourhoods in Hamburg, two small communities in the cantons of Appenzell and Zurich as well as we made a concrete offer to the Rhein-Neckar metropolitan area in Germany. The improved module functionality (Serve the community) is also used to support an assisted living facility in the canton of Schaffhausen, making appointments on behalf of their residents with voluntary drivers, e.g. for doctor's appointments.

Thanks to the ActGo-Gate project funding, in Switzerland and Poland spin-offs from the Business Engineering Institute AG have been founded as possible transfer companies to bundle the exploitation activities and for commercial software agreements such as for the roll-out of the "Serve the community" module to the Sozialstation Weil der Stadt.

10 CONCLUSION

The main finding of this deliverable is that we have to commit ourselves to a given amount of marketing costs for the ActGo-Gate software as a new product in the minimum amount of 6.000 € per year as well as to vital and fundamental staff investments.

The field evaluation interviews showed a great interest into and outstanding feedback to the usability of the software. Interview partners not seeing direct and straightforward competitors demonstrates having the finger on the pulse and cost efficiency as well as contemporary offerings to public and social institutions is a topical subject to all potential customers. This is underlined by cost saving restrictions that we can use to promote and message our product and its unique selling proposition. On the other hand, this means we have to come along with willingness to pay adjusted and flexible license and set-up fees to realize the business to break even within 22 months.

These findings have to be evaluated accurately to decide the raise and investment challenges and opportunities for the project consortium. An option to value the business formation costs relying mainly on required staff in project management, sales and IT as well as marketing costs, could be to force sales activities within the project consortium before starting up a new company with a required amount of at least 16 sales within the first year.

REFERENCES

In the current document no sources are available.

