



## Encouraging good analytical practices between business managers

How to build effective role-plays and encourage peer support

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## Foreword

This document has been created and written thanks to the project “ESTEEM” (Enhance and Stimulate Trust while Exploring new forms of Entrepreneurship Modules), a 24 months project co-financed by the Erasmus + programme.

Its aim is to support female entrepreneurship by encouraging trust and by exploring and developing new forms of entrepreneurship training modules.

The project is led by the Chamber of Craft of the Auvergne Rhône Alpes region (CMAR ARA), in collaboration with the Spanish association APECVA, the Portuguese university institute ISCTE and the Italian association TDM 2000 International.

The project has 4 main activities:

1. To study the psychosocial codes and cognitive aspects of a business which influence the entrepreneur’ profile whether they are men or women.
2. To allow female managers to enhance their soft-skills: self-confidence and self-esteem, through the design and experimentation of innovative training modules around female leadership.
3. To encourage collaborative exchanges and peer support between female managers, by implementing good analytical practices between business leaders
4. To facilitate the access of female entrepreneurs to different funding options, by developing a tool to identify and explore different funding solutions.

This document is the result of the work carried out for the 3rd Intellectual Output (IO), led by experts from CMAR ARA, with the support of all project partners.

## Introduction

The craft sector is a major player in the economy, through traditions, expertise, and culture. It is a dynamic and growing sector, whose contribution to the dynamism of territories is well established. It is an economic sector made up mainly of small companies, disseminated throughout the countries and which are an essential element in the economic development of rural areas.

Indeed, craft companies appear to be the baker around the corner, the local supplier to the car industry, the family restaurant creating jobs in town, the secretary facilitating a smooth running of a business, or the artisan designer that international buyers are looking from distance for the quality of their product. They are often individuals or very small businesses, frequently family-run.

These very small enterprises link all the countries and carry strong values of transmission, excellence, know-how, short circuits, proximity, and even sustainable development. In recent years, there has been a new attraction towards crafts by retraining people, wishing to give a new meaning to their life and choosing crafts as a career change. However, the craft sector still suffers from a negative image in the eyes of the public, which too often considers crafts as exhausting activity which offer a limited future. This negative image also persists due to a lack of gender mix in many activities. In fact, the volume of women leading a craft business reaches only 25% and the activities run are often gender biased. Most women work in services, caring profession (hairstylist, esthetician) or in production activities related to the traditional crafts (jeweler, textile, pottery, etc.); few of them represent sectors such as mechanics or building.

Mixed jobs, professional equality between women and men, and female entrepreneurship are therefore priority issues to tackle in order to further expand and promote the craft sector.

### **Why there is a need to support female entrepreneurship?**

Experts in entrepreneurship assume that women are less likely to start businesses than men because they face more obstacles (financial, time, and even self-confidence). In addition, according to a survey carried out in 2018 by the CMAR ARA (Lyon Rhône department), 48% of women think it is more difficult to be a manager than an employee and that to be successful, the catchword must be "compete to win, have relationship, have character".

Many studies have pointed out that perceived barriers on women act as a socially established "glass ceiling" that prevents the women's progression in their professional career. In other words, in theory the same options of career development are proposed to men and women, in practice there is an invisible barrier that allows men to progress and not women.



The limitations imposed on women are even more visible as we move up in positions with greater responsibility and power. In the business field, and notably in the craft sector, women have encountered many barriers related with stereotypes and prejudices. These socially generated limitations have been contributing to enhance a psychosocial profile in women, with a lower perceived level of self-confidence, lower well-being, lower expectations of improvement and a greater degree of negative emotional influence that are the cause and the effect of their difficulties to progress.

To understand how gender, psychosocial concepts and codes influence business leaders, we carried out a quantitative and qualitative study in accordance with the first activity of ESTEEM program. Indeed, the influence of the various psychosocial skills on the entrepreneurial process, whether they facilitate it or not, depends on whether such factors have been developed. If such skills impact differently men and women, we must identify the key psychological skills which limit women entrepreneurship and then design training modules accordingly. The results of our investigations are published in the "[Research study on how the psychological codes and cognitive aspects of a business leader are influenced by the gender](#)".

Amongst the main conclusions and recommendations, is the study highlights the importance for business leaders to develop their self-efficacy, which is a key psychosocial variable that plays a role in the success of an entrepreneurial project. Business leaders should work on the development of their self-esteem and should trust their abilities to improve relations with other workers, potential clients etc. An additional critical advice is to develop social and communication skills. Finally, it is noted that even though barriers are perceived in the same way by men and women regardless of the gender, several limitations imposed by society might restrain women to become entrepreneurs. Consequently, women must work harder on the development of their psychosocial factors to overcome those challenges.

Considering the results of the research study, in the following steps of the project we have developed several activities and innovative modules to strengthen the psychological variables that are key to secure the success of a female entrepreneurial project. The activities presented in this report encourage collaborative exchanges and peer support between female managers.

## Encouraging collaborative exchanges between female business managers

When a woman starts a business, it is much more than a professional project, it is a life project. This requires work on oneself beforehand. Women must be given the opportunity to reflect on their project, to take time to think things through to build it, to benefit from advice, support, without judgment and with kind cooperation. The best response to the risk of entrepreneurial isolation is to encourage female entrepreneurs to get out of their usual environment, out of their comfort zone, by offering them opportunities to discuss and confront with others. Thus, it is important for them to belong to a network.

Belonging to a network appears as a pillar to move forward, even for managers (women or men) who already practice coaching. The secrets of network: strong recommendation and "mirror effect".

Members in fact forge links between them, exchange views between business leaders (women or men) during dedicated events (workshops, focus groups, convivial meetings, business breakfast etc.), meet "role models". These often prove to the most novices that it is possible to overcome obstacles (notably related to the status of woman - maternity, part-time, finding funds when you want to set up a business, etc.).

The links between members develop quite naturally in a network, and they are increasingly strengthened, if they are nurtured.

Role models are a key aspect of the network and play an essential part in the growth of novices. Consequently, the partners of ESTEEM have agreed to work on this peculiar relationship, through the creation of "role-plays" adapted specifically to the needs of individuals wishing to create their own enterprise. While this exercise can be played both by men and women, during the ESTEEM project, the partners have paid a particular attention to involve women interested in setting up their own business

## Role-plays for future/newly established business leaders

### What is a role-play

Role plays are exercises that give individuals the opportunity to assume the role of a person or act out a given situation. These roles can be performed by participants in solo, in pairs, or in groups to play out a more complex scenario. Role plays engage participants in real-life situations or scenarios that can be "stressful, unfamiliar, complex, or controversial" which requires them to examine personal feelings toward others and their circumstances (Bonwell & Eison, 1991, p.47).

In the framework of ESTEEM, role plays have been conceived to reproduce professional situations that business managers face in their career. Future entrepreneurs (or newly



established once) have been invited to participate to simulations of real-life situations together with more experienced entrepreneurs (or experts). Their reactions have been analysed by peer future entrepreneurs, well-established business leaders and business experts.

## The ESTEEM methodology

The methodology developed by ESTEEM propose to future business leaders (or newly established ones), to participate to professional scenarios, together with more experienced business leaders (or business experts). The scenarios are specifically created to deal with potential stressful situations that, at least once in their entrepreneurial life, future business leaders will be confronted to. The most experienced leaders play the role-model, and based on they experience, they challenge the newcomers and observe their reactions. If the players agree, the role-play is also recorded. At the end of the role-play, the main players are asked to self-analyse their behaviours, and feedback is then provided by the role-models. As role-plays are designed to be played in small groups, the rest of the audience, notably peer future business leaders, are also invited to express their feelings and recommendations. The whole feedback process is animated by a spirit of *gentle criticism*, which aim is to support the growth of the main player of the scenes. Finally, one-to-one feedback is organized later on between the player and a business expert, who has participated to the scene. This allows the pair to analyse in detail the player's behaviour and the feedbacks received, with the support of the video recording, when available. The future business leader is finally provided with an observation report that includes advice and recommendations on how to improve the weaknesses observed.

The ESTEEM methodology therefore includes 3 mains steps

1. Construction of the role-play
2. Collective workshop
3. Final personal feedback







Steps are detailed in the following sections.

## Step 1. Construction of the role-play

Construction of the role-play is the first essential step of the methodology.

At the beginning of the project, the ESTEEM partners agreed to split the activity in 2 distinct moments: a first [collective workshop](#) (when the “role-play” is staged) and the subsequent [personal feedback](#) (see Step 3).

About the role-play (step 2), the partners agreed on the following key aspects:

1. **Format:** preferably in person
2. **Size of the group:** preferably small, 6-8 people in total to make the main players comfortable and allow an open and rich discussion
3. **Participants:** max 4 future (or newly established) business managers who are playing their own roles; 1 or 2 role models; 1 or 2 moderators, who facilitate the role play and provide the individual feedback (during the ESTEEM project, the moderators were members of the ESTEEM project team)
4. **Number of scenarios:** max 3 different scenarios per role-play/workshop
5. **Duration:** each scenario shall take 10-15 minutes to be played. Every scenario is played by a different future business manager. The role model can be played by the same person for all.
6. **Immediate feedback (after each scenario):** 10 minutes per scenario, including an auto-evaluation from the main beneficiary of the activity (i.e., the new business leader), feedback from the observers (the rest of the audience) and the role model.
7. **Final wrap up session:** global review of the activity, with feedbacks and recommendations for future improvement of the workshops from all the participants

To build role-plays, the following issues must be considered:

1. **The choice of the subject:** every role-play is focused on one specific topic, which should be general enough to allow the creation of different scenarios. The ESTEEM partners have considered the following ones: financing an entrepreneurial project; negotiation with suppliers; networking; parental leave; HR management; boarding plans; workplace solutions for childcare; diversity management; mental and health management in the workplace; training and re-training of the employees; work ethics. The topics chosen for the pilot activities during the project’s implementation are presented in the chapter [“Learnings from the pilot experience”](#).
2. **The choice of the context:** the participants must imagine themselves in a specific context, which is to be developed considering the subject to work on. For instance, the



CMAR ARA has proposed to work on the topic “negotiation skills” in the framework of a professional trade fair, for which three different scenarios were then developed. As players always simulate the role of a business leader, they need information about the business they are leading (ex. type of company, sector of activity, background of the business leaders, etc.). When it is not possible to adopt the enterprise of the beneficiary for the simulation (i.e. the player), the project team must imagine a fictive company and provide such information.

3. **The definition of the scenarios:** every role play should include 3 different scenarios, representing possible situations that the business leader can face in the context chosen for the role-play. For every scenario, a particular role must be imagined for both the beneficiary of the activity and the role model. The contexts proposed by the ESTEEM project team are listed below and included in the tools attached to this report.
4. **Roles of the participants to the role-play:** each role-play is made up of maximum three different scenarios. For every scenario, the role of the [participants](#) must be clearly defined. There are 3 participants per scenario: the beneficiary of the activity, (i.e. the future or new business leader), the role model and the moderator. Their features and parts are detailed in the [section below](#).
5. **The assessment of the beneficiary:** how to assess the behaviour and attitude of the beneficiary? What aspects should be considered? The [animation support note](#) (detailed below) guides the evaluators in this task.
6. **The preparation of the questions to guide the role-model:** when at all possible, role models should be involved in the construction of the roleplays. They should receive in advance the context and the different scenarios, to get familiar with them and his/her intervention. To guide their intervention, it is useful to provide them with a set of questions previously discussed together.

To help the construction of the role-plays, the partners have elaborated the script template that guides the overall activity (see section “[Tools](#)”).

## Step 2. Collective workshop

The second step of the methodology corresponds to the organization of the collective workshop where the role play is staged.

First, the organizers shall decide what participants they want to recruit (see section “[The participants](#)”) and take care of all the logistics behind the organization of the collective workshop (set the date, send the invitations, book the meeting room, prepare the documents for the participants, etc.).



On the D-day, a moderator welcomes the participants, presents the activity and explain its objectives. Then, he/she invites each participant to introduce himself/herself.

During the pilot implementation, we observed that role plays are stressful exercises for many future business leaders: the unexpected reaction of the rest of the audience and the role model, as well as the feeling of being “assessed” in front of unknown peers create apprehensions for many of them. Thus, it might be helpful to propose a short icebreaker to release the pressure and make the players more comfortable.

The moderator then presents how the role play will be organized: he/she recalls the duration, explains the context, and introduce the role of every participant. Both the role model and the beneficiary shall have received information about the context and the scenarios to play in advance.

Once all beneficiaries have received their scenario, the role-play can be staged.

The first beneficiary and the role model start their interactions in front of the rest of the audience. During the performing, the organizers, who in our case where the ESTEEM project members, take notes and analyse the interactions using the [assessment grid](#) prepared for this purpose. At the end of each scenario, the immediate feedback section takes place.

The beneficiaries are first invited to self-assess their attitude and behaviour. Then, the rest of the audience provide its feedbacks and finally, the role model gives his/her opinion.

The scenario is then changed, and a new beneficiary can start the performance.

Once all the beneficiaries have played their scenarios, a discussion is open about the activity. Feedbacks are collected from all participants, which can take the chance to review their performance and evaluations in the light of all the opinions and advice expressed during the workshop.

Finally, the organizer recalls the second part of the activity, which are the individual personal feedbacks. During the pilot experiences, we observed that during the final moments of the workshops, the discussions were richer as the pressure of the performance was released.

### Step 3. Personal feedback

The personal feedback is the last step of the activity. It is preferably scheduled some days after the role-play. The moderator who has participated to the role-play meets each beneficiary individually and provides exhaustive feedback on the role-play. If available, the participant reviews also the video recording of his/her scenario, which supports the analysis of the behaviour, gestures and attitude. All comments and recommendations are discussed and then included in the [observation report](#) which is handed over to the participant.

## Participants

3 types of participants are involved in the collective workshop:

- The beneficiaries of the activity, i.e. the main players
- The role model
- The moderator

## Beneficiaries

The main beneficiaries of this activity are future or newly established business leaders, who must behave naturally and act openly in front of the role-models. Indeed, only if they express their genuine attitude in front of a stressful real-life situation, they can be coached on how to improve their reactions and gestures. This helps them to increase their self-confidence and feeling of self-efficacy, so that when they will face a similar real situation, they will be more ready to react.

When it is not possible to perform representing their own enterprise, the beneficiaries must be “equipped” with a fictive profile and enterprise. Back to the example of the role-play on negotiations in the framework of a trade-fair, the CMAR ARA for instance has imagined a food truck company owned by young businessman. The project team had imagined the concept behind the company, the legal status, the structure, and the profile of the owner. The participants to this role-play had to impersonate this character.

## Role models

Role models must be played by individuals who have a solid experience in entrepreneurship, or they must be experts in the topic chosen for the role-play. They must be preferably recruited amongst business leaders who have been through similar issues and can provide an honest and constructive feedback, based on their experience. If possible, role models should be involved in the construction of the role-play and be equipped with a set of questions agreed in advance. These helps to guide the conversation on key topics and are deemed important to discuss.

## Moderator

The moderator is usually the person who organizes the collective workshop and the following personal feedback. He/she is the person who develops the role play, chooses its topic, imagines the context and the scenarios, recruits the participants, etc. During the D-day, the moderator welcomes the participants, recalls the objective of the role-play, explains the role of the participants, and facilitates the workshop. As the moderator is also the one that organizes the individual feedback, it is recommended to choose a person able to assess the behaviour of the beneficiary during the role-play. Though there is no need for a solid experience on



entrepreneurship, he/she should have some knowledge about it or, at least, work in collaboration with a business expert to develop the role-play.

## Tools

To build an effective role-play, the ESTEEM partners have worked on several templates and documents:

### Script template

The script template: it is a methodological document that guides the overall activity. The script template is made of 3 different parts:

- The roleplay's construction, which describes the different steps to follow to prepare the role-play;
- The collective workshop, which provides guidelines on how the facilitator should organize the meeting where the role-plays will be carried out;
- The personal feedback, which provides guidelines on how the individual feedback should be provided once each round of role-plays is over.

### How to use the script template

In template available in the toolkit,

- the blue cells are general guidelines and should not change.
- the white cells must be filled and personalized for every role play. In the framework of the ESTEEM project, partners agreed to always work on the same subject. Then, partners were free to adapt the context and scenarios to each partner's and country's specificities.

The script template therefore has been conceived as a living document, meaning that it can be updated by any organization wishing to implement the role-plays.

### Role-plays information

The roleplay information is a document that includes a description of the specific context proposed for the role-plays (ex. company "Tartuffe"; Lyon gastronomy and street food festival). Every organization willing to set up a role-play should create one<sup>1</sup>, adapted to the subject chosen for each role-play (ex. the subject of the first role-play conceived by the ESTEEM partners is "negotiation skills"). For every role-play session, each partner must create one specific context that is adopted by the 3 entrepreneurs/main beneficiaries who will play. The role-play information is to be shared with the role model and the participants before the activity.

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<sup>1</sup> A template is provided in the toolkit attached to this document.



The role-play information can be prepared with the help of external partners or different stakeholders, which are involved in the activity as role models.

### Animation support note

The animation support note is an internal document that serves to guide the observation and understand how to evaluate the entrepreneur's behaviour during the role-plays.

The partners have decided to assess 3 main aspects of the beneficiary's performance:

- the entrepreneur's posture
- the entrepreneur's behaviour
- the self-perception of the entrepreneur

Every aspect is then split in different additional sub-aspects:

Aspects to assess	What to assess
Entrepreneur's posture	Eye contact
	Language
	Physical gesture
Entrepreneur's behaviour	Reactivity
	Adaptability
	Self-Initiative
	Persuasion/ capacity to convince an audience
Self-perception of the entrepreneur	Self-confidence

A definition of every category is provided in the animation support note included in the toolkit attached to this document, together with the evaluation criteria and an explication that guides the evaluation.

The animation support note also helps to prepare the observation report, which will be handed over to the entrepreneur at the end of the individual feedback. Every project partner will have to prepare one animation support note per entrepreneur participating to the role-plays.

### Assessment grid

The assessment grid: it is the grid to be used to assess the behaviour of each beneficiary during the role-plays (one grid per beneficiary). It is an empty document that must be used once the evaluator is familiar with the criteria of evaluation and their definition, included in the animation support note.

## Observation report

The observation report is the report of the activity that includes the overall “assessment” on the entrepreneur’s performance during the role-play. It serves as a basis for discussion between the beneficiary of the activity and the organizer of the role-play, and it is completed during the final individual feedback. This allows to integrate some later reactions of future entrepreneur, who has had the possibility to reflect about his/her performance and the comments received. The observation report is handed to the entrepreneur at the end of the individual feedback, leaving a concrete track of the activity carried out.

## Video

Recording the role-play and the performance of the different beneficiaries can be a very useful tool to enrich the discussion during the personal feedback. However, during the pilot experiences we have observed that the recording of role-plays makes people nervous and is often not welcomed.

Several entrepreneurs, notably in Italy for instance, have refused to record their performance. In France and Portugal, some beneficiaries of the role-plays accepted this exercise only after long discussions and once being reassured that the videos were only used for analytical purposes and not made public.

It must be noted, however, that despite the initial refuse, the beneficiaries who finally accepted to record their performance highly appreciated this tool. In some cases, videos revealed gestures and attitudes that were initially denied by the entrepreneurs, making them aware of a posture to improve.

## Learnings from the pilot experience

The 4 partners of the ESTEEM project have implemented 3 different rounds of role-plays during the project implementation. Every round was focused on a specific topic chosen amongst a list of issues that were considered important to work for future business leaders, on the base of the expertise and experience of the partners. The topic chosen for the pilot implementation are

- Negotiation skills
- Management of human resources
- Strengthening financial skills

For every topic, CMAR ARA, leader of this activity, proposed different scenarios. Partners were then invited to adapt each scene to the specificities of their targeted public.

**Examples of role-plays, context and scenarios carried out by the CMAR ARA**

<i>Topic</i>	<i>The context</i>	<i>Scenarios</i>
<b>Negotiation skills</b>	Participation of a food truck to the Lyon Gastronomy Festival	The manager of the food truck company must persuade the head of the festival to let him/her participate
		Just before the festival, one of the main suppliers of the food truck is out of stock. The business manager must meet a new one.
		During the festival, the business manager meets a potential new big client.
<b>Management of human resources</b>	The manager of a well-established bakery is facing several issues concerning HR management	Job interview for a new employee
		Annual employee review
		Conflict resolution
<b>Strengthening financial skills</b>	A potential entrepreneur wishes to set up his own business and become a driver in the tourism sector	Pitching of the business project to the bank
		Presentation of the financial forecast to the bank

*The examples of the role plays developed during ESTEEM are provided in the toolkit that completes this guide.*

In total, 12 scenarios were staged in every partner country. The beneficiaries of this activity involved by the ESTEEM partners were mainly future or newly established entrepreneurs, but also people unemployed, students or young people interested in entrepreneurship.

The main learnings and recommendations issued from the pilot experiences are:



- Role-plays were generally well appreciated by participants, who recognized the interest of such exercise as a mean to strengthen their soft skills and get better prepared to face similar situation in future. These exercises were tested amongst different types of publics: psychology students, young rural participants, individuals in the process of creating their own enterprise and newly established entrepreneurs. The latter two groups particularly appreciated this activity, as they found immediate benefit in their daily life as business leaders.
- Small size groups are highly appreciated by the beneficiaries of the activity. As the exercise is stressful and individuals are uncomfortable with being assessed by foreigners, a small audience is comforting. In addition, small groups allow more open discussions and leave the time to discuss feedbacks and advice received more in depth.
- Video recording is recommended but optional. Not all beneficiaries are comfortable with this tool, which, at first sight makes people nervous and anxious. In case videos are made, it is imperative to ask for the consent of the participants and it is highly recommended to keep them confidential.
- Role plays are interesting activities to integrate in more complete training or support programmes. This is particularly recommended for organizations for which the support to entrepreneurship is not a core activity. The risk of organizing a one-shot role-play is that the organizer is perceived as less legitimate to assess the behaviour of entrepreneurs, even if business experts are recruited for this purpose.
- For established entrepreneurs, as they have little time to dedicate to extra activities, the time gap between the collective workshop and the personal feedback should be adjusted to their needs. In Italy, for instance, they preferred to organize it immediately after the collective workshop. In France, it was appreciated to have it a few days later.
- A similar remark has been observed for role-models. Experienced entrepreneurs or business experts are difficult to be involved in non-paid activities. The integration of the role-plays in a more complete training or support programme facilitates the recruitment of experts who are already involved in different activities.
- Providing constructive feedback is not always easy. Entrepreneurs, notably the ones established since long time, are very proud of their knowledge and in general they are very protective towards their work, and they are not very prone to accept suggestions from others. Therefore, it is essential to propose this activity on a voluntary base. The role-plays conceived in the framework of ESTEEM are also more adapted to individuals who are creating their own business and have no prior experience in entrepreneurship.

## Conclusions

The experience carried out during the ESTEEM project proved that the role plays are an interesting and effective exercise to strengthen key soft skills for future entrepreneurs, such as self-efficacy, self-esteem and communication skills, thanks to collaborative exchanges and peer support between managers.

Such exercises were particularly appreciated by women involved in traditional business support programmes, who are usually offered with theoretical trainings and mainly one-to-one activities (future entrepreneur – business coach).

To such women, the role plays offered the possibility to experience, often for the first time, a real-life situation, to test them-selves and train for the future. For many, it was also the first time they had to present their business project to people other than their business coach and get the opinion of externals. The role plays, therefore, obliged the beneficiaries to get out from their comfort zone, face with an unusual situation, and be confronted with the kind criticism of peers and experts. Finally, this activity offered future business leaders with the opportunity to networking with peers facing similar issues during the creation of their own enterprise, allowing individuals to confront ideas, share advice and good practices.

The experience of ESTEEM, therefore, proved that role plays, and similar collective exercises, are essential activities to support the development of key skills for entrepreneurship. Training programmes for business creators, therefore, should offer a good balance between both collective and individual trainings, mixing theoretical contents with more practical exercises, such as role plays. This is specifically important for programmes addressed to women interested in entrepreneurship, who need to work harder on the development of their psychosocial factors and overcome the challenges imposed by society to female entrepreneurship.