

## DEFINE STRATEGY DESIGN

### **Module 1: Digital Financial Services - Basic terminology**

This module will be taught in combination: face to face and online. The Face to face course will be based on the simple presentation of general and more complex terms and a discussion about their meaning (which the examples showing what these terms mean in practice should be included). Here PPT presentations will be used where also existing short videos explaining some terms more in detail will be included. Furthermore, paperboard and markers will be used within discussion with the learners. A glossary of the most commonly used terms within this topic will be included in the PPT materials.

The face to face course will also include a practical presentation on how to find the descriptions of the different terms on the internet. The online part of the course should include a glossary with compilation of terms commonly used in the area of digital financial services and an explanation of what these terms mean. Some of the most commonly used terms could also be presented online with short videos.

One game will be developed within this module, with an aim to check the knowledge gained. Also the video will be prepared in order to summarize what they learned within the module.

### **Module 2: Money management for seniors - how to budget, apply for benefits, and manage prepaid debit cards**

This module will include face to face learning, together with different online tools that help seniors get smart about their financial goals and build the financial planning knowledge they need. The module will include real world examples with an aim to enable seniors to understand and analyze many personal decisions they confront on a daily basis. Resources (learning materials, examples etc.) that already exist in this field will be included. PPT presentations will be developed and word document as a training guidelines for trainers. Learners will learn also on the basis of real examples in the excel sheet and in the online tool for planning the budget. A glossary of the most commonly used terms within this topic will be included in the PPT materials.

One game for checking the lessons learnt will be included, furthermore in the video the summary of the module will be included.

### **Module 3: Online banking environment**

This module will include face to face learning, together with different case study examples. The module will be practically oriented in order to help seniors to use online banking environment independently after the DEFINE project ends. This means that practice accounts of banks could be used. Regarding the fact that there are different possibilities in partner countries, this module should be adopted to the national level in each partner country.



While developing a module we should search for possibilities to use already existing platforms from banks in order to be able to show seniors what exists on the market. Sources (learning materials, examples etc.) that already exist in this field can be included.

Some general instructions guiding seniors with simple online transactions can be presented also in videos. A glossary of the most commonly used terms within this topic will be included in the PPT materials.

There will be one game with real simulation in the online banking environment, where seniors will be able to check their knowledge about managing their account online. Furthermore, in the video the summary of the module will be presented.

#### **Module 4: Online Security and Data protection**

This module will include face to face learning and online materials for later use, together with different case studies, to show seniors scenarios with different examples of financial abuse. Scenario games could train seniors to reject attacks. Scenario games could show them how to detect fake bank emails and pages. Furthermore, also a written document with tips on security issues could be prepared. Sources (learning materials, examples etc.) that already exist in this field can be included. A glossary of the most commonly used terms within this topic will be included in the PPT materials.

One game and also a video summarizing the whole module will be prepared.

#### **Module 5: Using alternative payment methods**

This module will include face to face learning with PPT presentation of different payment methods. Case studies could support the presentation of the methods, further in face to face learning seniors will also learn how to pay with different methods of payment. A glossary of the most commonly used terms within this topic will be included in the PPT materials.

One game and the video with the summary of the module will be prepared also within this module.