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SMART Management of Small Businesses:
Synergy of Marketing, Logistics
and Digital Technologies

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SMART-менеджмент малого бізнесу: синергія маркетингу, логістики та цифрових технологій

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The monograph is devoted to justifying the implementation of SMART management in small business activities in the context of digital transformation. SMART management is considered as an integrated data-driven management concept that combines digital technologies, intelligent tools and human-centred principles. An innovative SMART management model has been developed, aimed at increasing the efficiency and competitiveness of small businesses, as well as methodological approaches to assessing the managerial and digital maturity of enterprises. The role of digitalisation of local communities and the POLIDIH platform in reducing investment barriers and developing small businesses is substantiated.

The monograph is intended for researchers, higher education students, practitioners, small business managers and representatives of local community authorities.

Монографію присвячено обґрунтуванню впровадження SMART-менеджменту в діяльність малого бізнесу в умовах цифрової трансформації. SMART-менеджмент розглянуто як інтегровану data-driven управлінську концепцію, що поєднує цифрові технології, інтелектуальні інструменти та принципи людиноцентричності. Розроблено інноваційну модель SMART-менеджменту, спрямовану на підвищення ефективності й конкурентоспроможності малого бізнесу, а також методичні підходи до оцінювання управлінської та цифрової зрілості підприємств. Обґрунтовано роль цифровізації територіальних громад і платформи POLIDIH у зниженні інвестиційних бар'єрів та розвитку малого бізнесу.

Монографія адресована науковцям, здобувачам вищої освіти, фахівцям-практикам, керівникам малого бізнесу та представникам органів управління територіальних громад.

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CONTENT

З М І С Т

FOREWORD

The current stage of socio-economic development is characterised by accelerated digital transformation, increased uncertainty and intensified competitive pressure, which is fundamentally changing the conditions in which small businesses operate. Globalisation processes, the digitalisation of the economy, changes in consumer behaviour and increased demands on the speed and quality of management decisions necessitate a rethinking of traditional approaches to small business management. Under these conditions, classic management models are increasingly proving insufficient to ensure the sustainable development and adaptability of small businesses, which highlights the need to develop innovative management concepts.

The monograph «SMART Management of Small Businesses: Synergy of Marketing, Logistics and Digital Technologies» is focused on substantiating the theoretical, methodological and applied foundations for the formation and implementation of the SMART management model in the activities of small businesses in the context of digital transformation and growing instability in the business environment. The highlight of the publication is an attempt to reveal the effect of integrating marketing and logistics tools with modern digital technologies as a holistic management paradigm for improving the efficiency and competitiveness of small businesses.

The monograph consists of seven logically interconnected sections, which sequentially reveal the key theoretical, methodological, and applied aspects of SMART management research in small businesses. The work summarises the evolution of strategic management of small enterprises and substantiates its specifics in the context of resource constraints, the growing role of entrepreneurs in decision-making, the increased

dynamism of the external environment and the need to apply flexible competitive strategies. The emphasis is on the transformation of management approaches under the influence of digitalisation, which is shaping a new logic for the organisation of business processes and strategic development.

The essence of SMART management as an integrated management concept based on data-driven approaches, the use of digital and intelligent technologies, data analytics, and human-centred principles is substantiated. It analyses current trends in small business development, identifies the challenges and opportunities of digital transformation, and demonstrates the feasibility of transitioning from traditional to flexible, customer-centric and platform-based business models.

Special attention is paid to the role of marketing and logistics as strategic components of small business development. The peculiarities of marketing strategies in the digital environment, the development of personalised communications and branding are revealed, and the importance of logistics management and logistics innovations for the integration of small enterprises into modern value chains is substantiated.

The key result of the scientific research was the development of an innovative model of SMART management of small businesses as a holistic architecture of strategic management that ensures the integration of marketing, logistics, and digital technologies. Methodological approaches to assessing the managerial and digital maturity of small enterprises are proposed, and practical recommendations for the implementation of SMART management are summarised, taking into account global digital trends and European integration processes.

The final part of the monograph examines the digitization of territorial communities as a key tool for overcoming investment barriers to small business development in conditions of limited

resources and the consequences of war. The main factors contributing to the low investment attractiveness of communities are identified, in particular, limited access to financing for small businesses. The role of the Polissya Center for Digital Innovation (POLIDIH) as a platform for the digital transformation of rural areas is substantiated, which, based on geoinformation and satellite data, increases the transparency of management and the investment attractiveness of communities. Particular attention is paid to the community's geo-investment passport as a practical tool for forming a unified investment ecosystem and ensuring the sustainable development of small businesses.

The monograph is intended for researchers, teachers, graduate students, students of economics and management, as well as practitioners and small business managers, representatives of local government bodies who are interested in implementing modern SMART approaches, digital tools, and innovative management solutions in a dynamic market environment.

ПЕРЕДМОВА

Сучасний етап соціально-економічного розвитку характеризується прискоренням цифрових трансформацій, зростанням рівня невизначеності та посиленням конкурентного тиску, що докорінно змінює умови функціонування малого бізнесу. Глобалізаційні процеси, цифровізація економіки, зміна споживчої поведінки та підвищення вимог до швидкості й якості управлінських рішень зумовлюють необхідність переосмислення традиційних підходів до управління малими підприємствами. За цих умов класичні моделі менеджменту дедалі частіше виявляються недостатніми для забезпечення сталого розвитку й адаптивності суб'єктів малого бізнесу, що актуалізує потребу у формуванні інноваційних управлінських концепцій.

Монографія «SMART-менеджмент малого бізнесу: синергія маркетингу, логістики та цифрових технологій» орієнтована на обґрунтування теоретико-методологічних і прикладних засад формування та впровадження моделі SMART-менеджменту в діяльності суб'єктів малого бізнесу в умовах цифрової трансформації та зростаючої нестабільності бізнес-середовища. Родзинкою видання є спроба розкриття ефекту інтеграції маркетингових і логістичних інструментів із сучасними цифровими технологіями як цілісної управлінської парадигми підвищення ефективності та конкурентоспроможності малого бізнесу.

Монографія структурно складається з семи логічно взаємопов'язаних розділів, у межах яких послідовно розкрито ключові теоретичні, методологічні та прикладні аспекти дослідження SMART-менеджменту малого бізнесу. У роботі узагальнено еволюцію стратегічного управління малими підприємствами та обґрунтовано його специфіку в умовах ресурсних обмежень, зростання ролі підприємця у прийнятті рішень, підвищеної динамічності зовнішнього середовища й

необхідності застосування гнучких конкурентних стратегій. Акцент зроблено на трансформації управлінських підходів під впливом цифровізації, яка формує нову логіку організації бізнес-процесів і стратегічного розвитку.

Обґрунтовано сутність SMART-менеджменту як інтегрованої управлінської концепції, що базується на data-driven підходах, використанні цифрових та інтелектуальних технологій, аналітики даних і принципах людиноцентричності. Проаналізовано сучасні тенденції розвитку малого бізнесу, визначено виклики та можливості цифрової трансформації, а також доведено доцільність переходу від традиційних до гнучких, клієнтоорієнтованих і платформних бізнес-моделей.

Окрему увагу приділено ролі маркетингу й логістики як стратегічних складових розвитку малого бізнесу. Розкрито особливості маркетингових стратегій у цифровому середовищі, розвитку персоналізованих комунікацій і брендингу, а також обґрунтовано значення логістичного менеджменту й логістичних інновацій для інтеграції малих підприємств у сучасні ланцюги створення вартості.

Важливим результатом наукового пошуку стала розробка інноваційної моделі SMART-менеджменту малого бізнесу як цілісної архітектури стратегічного управління, що забезпечує ефект інтеграції маркетингу, логістики та цифрових технологій. Запропоновано методичні підходи до оцінювання управлінської й цифрової зрілості малих підприємств та узагальнено практичні рекомендації щодо імплементації SMART-менеджменту з урахуванням глобальних цифрових трендів і євроінтеграційних процесів.

У заключній частині монографії розглянуто цифровізацію територіальних громад як ключовий інструмент подолання інвестиційних бар’єрів розвитку малого бізнесу в умовах обмежених ресурсів і наслідків війни. Визначено основні чинники низької інвестиційної привабливості громад, зокрема обмежений доступ малого бізнесу до фінансування.

Обґрунтовано роль Поліського центру цифрових інновацій (POLIDIH) як платформи цифрової трансформації сільських територій, що на основі геоінформаційних і супутникових даних підвищує прозорість управління та інвестиційну привабливість громад. Особливу увагу приділено геоінвестиційному паспорту громади як практичному інструменту формування єдиної інвестиційної екосистеми та забезпечення сталого розвитку малого бізнесу.

Монографія адресована науковцям, викладачам, аспірантам, здобувачам вищої освіти економічних і управлінських спеціальностей, а також фахівцям-практикам і керівникам малого бізнесу, представникам органів управління територіальних громад, які зацікавлені у впровадженні сучасних SMART-підходів, цифрових інструментів і інноваційних управлінських рішень в умовах динамічного ринкового середовища.

CHAPTER 1

THEORETICAL AND METHODOLOGICAL BASIS OF SMART SMALL BUSINESS MANAGEMENT

ТЕОРЕТИКО-МЕТОДОЛОГІЧНІ ЗАСАДИ SMART-МЕНЕДЖМЕНТУ МАЛОГО БІЗНЕСУ

The theoretical and methodological foundations of SMART management of small businesses in the context of digital transformation and growing turbulence in the business environment are substantiated. The evolution of strategic management of small enterprises is revealed and its specifics are determined, which are caused by resource constraints, the high role of the owner and the need for adaptive competitive strategies. The essence of SMART management as an integrated management concept based on data-driven approaches, digital technologies, and human-centredness is defined, and a comparative analysis with traditional management models is conducted. The importance of integrating marketing communications, logistics, and digital tools based on omnichannel and customer experience management is substantiated. A conclusion is made about the strategic feasibility of implementing SMART management to increase the competitiveness, sustainability, and long-term development of small businesses in Ukraine.

Обґрунтовано теоретико-методологічні засади SMART-менеджменту малого бізнесу в умовах цифрової трансформації та зростаючої турбулентності бізнес-середовища. Розкрито еволюцію стратегічного управління малими підприємствами та визначено його специфіку, зумовлену ресурсними обмеженнями, високою роллю власника й потребою адаптивних конкурентних стратегій. Визначено сутність SMART-менеджменту як інтегрованої управлінської концепції, що ґрунтується на data-driven підходах, цифрових технологіях і людиноцентричності, а також проведено порівняльний аналіз із традиційними моделями управління. Обґрунтовано значення інтеграції маркетингових комунікацій, логістики та цифрових інструментів на основі омніканальності й управління клієнтським досвідом. Зроблено висновок про стратегічну доцільність упровадження SMART-менеджменту для підвищення конкурентоспроможності, стійкості та довгострокового розвитку малого бізнесу в Україні.

1.1. Evolution of strategic small business management concepts

Small business is an important component of the economy, providing jobs and promoting entrepreneurship. In Ukraine, small and medium-sized enterprises account for about 98 % of all economic entities, but their contribution to GDP is only about 15 %. For comparison, in EU countries, the share of SMEs in GDP reaches 60–70 %.[1] This indicates that the potential of small businesses in Ukraine is not being fully realised. One of the reasons is the underdevelopment of strategic management; many small businesses traditionally avoid long-term planning and operate without a clear strategy. In the current turbulent business environment (war, digital challenges), this situation is becoming critical. There is a need for innovative and adaptive approaches to management that would ensure the sustainability and growth of small businesses. Let us consider how the concepts of strategic management have evolved and how they are applied in the practice of small businesses in Ukraine and around the world.

The concept of strategic management gradually took shape in the second half of the 20th century. The first approaches appeared in large corporations and were related to long-term business development planning. Since then, the concept of strategic management has evolved significantly – from simple budget planning to modern complex models of smart management and strategic sustainability. Each subsequent stage expanded the planning horizon and depth of analysis: from internal indicators to the external environment, from the short term to the long term, from reactive management to proactive and integrated management.

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[1] *Artiushok, V. (2022). Methods and models of strategic analysis in the business planning system. Economy and Society, 44, 44–61. https://doi.org/10.32782/2524-0072/2022-44-61.*

Researchers suggest calling the current phase of strategic management development innovation-adaptive, as it is based on constant adaptation and implementation of innovations. This is particularly relevant for small businesses, which are playing an increasingly important role in the global economy. Today, SMEs (small and medium-sized enterprises) account for up to 70 % of employment and a significant share of global GDP, but at the same time, 67 % of them are forced to «fight for survival» under pressure from competitors. Limited resources and expertise sometimes hinder the adoption of new technologies in small firms, reducing their long-term competitiveness. However, most organisations recognise the importance of technological change: more than 85% of respondents worldwide acknowledge that the adoption of new technologies and the expansion of digital capabilities are key drivers of business development. Thus, the modern concept of strategic small business management is closely linked to digital transformation, innovation and network integration.

The main stages in the evolution of strategic management are presented in Table 1.1.1.

It should be noted that small businesses joined this process somewhat later than large corporations. While large corporations widely implemented strategic planning as early as the 1960s and 1970s, the small business sector only began to apply these approaches in practice in the mid-1990s.

In the early 1990s, Ukrainian entrepreneurs were just learning the basics of strategic management and the ideas of strategic business orientation. During the Soviet period, private small businesses were virtually non-existent, so the 1990s saw a «catch-up» with Western practices. The first more or less formalised strategies appeared in those small firms that had achieved a relatively significant scale of activity and felt the need to plan their development several years in advance.

Table 1.1.1. Main stages of strategic management[2;3;4]

Stage/ concept	Characteristics and significance for business
1	*2*
Budgeting and control (early to mid-20th century)	Management based on post factum financial control. Decisions are mostly reactive, with strategy as a separate category almost absent. The external environment was considered relatively stable, so the focus was on internal efficiency (budget execution).
Long-term planning (1950–1960)	The emergence of formal long-term planning. Companies begin to draw up multi-year development plans. Strategy is articulated at the top management level for the first time (works by A. Chandler). The goal is to predict the future for 3–5+ years based on development trends. Small businesses at that time rarely used formal plans due to a lack of resources.
Strategic planning (1970)	Systematic analysis of the external environment and competition, formation of written strategic plans. Tools are introduced: SWOT analysis, Porter's matrices, portfolio models. I. Ansoff and others justify the need for flexible adaptation to market changes. Large companies actively introduce strategic divisions, while small ones only partially use these approaches.

[2] *Nosan, N., Yakymenko, T., & Panchenko, R. (2023). Strategic planning of enterprise activity. Economy and Society, 56. https://surl.li/dhoqac*

[3] *Filippov, V. Yu., Neikov, S. O., & Yangulov, E. P. (2024). Analysis of strategic management issues in small business based on sustainable development goals. Economic Journal of Odessa Polytechnic University, 1(27), 139–149. https://doi.org/10.15276/EJ.01.2024.1*

[4] *Yangulov, E. P. (2024). Theoretical justification of methodological foundations of a strategic management model for small enterprises. Economic Space, 196, 128–136. https://doi.org/10.30838/EP.196.128-136.*

Continuation of table 1.1.1

1	*2*
Strategic management (1980–1990)	Comprehensive strategic management: covers goal setting, strategy development, implementation and monitoring as a single process. Various schools and concepts of strategy are emerging (positional – M. Porter, resource-based – D. Barney, learning – H. Mintzberg, etc.), reflecting different aspects of strategy. For small businesses, the focus shifts to finding market niches, developing flexibility, and utilising their unique resources (e.g., proximity to customers, speed of change).
Adaptive-innovative stage (2000–2020)	The emergence of smart management – an integrated approach that combines innovation, digitalisation and network interaction. Strategies become dynamic and are constantly revised depending on changes in the environment. Digital technologies are used for data analysis and automation, and e-business tools, CRM and online communication are actively implemented. This stage is characterised by high market turbulence, globalisation and the need for rapid learning. New opportunities have opened up for small businesses to enter global markets through e-commerce and digital marketing, while competition has increased.

It should be noted that strategic management in small businesses has its own specifics compared to large companies. Small businesses have limited resources – financial, human, and time. The owner of a small business usually combines the roles of manager and strategist, while corporations have entire departments dedicated to strategic planning. This affects the approaches to strategy formation.

Traditionally, many small firms have operated intuitively, without written strategic plans. Research shows that most small businesses do not engage in formal strategic planning to the full extent. Instead, decisions are made by the owner as problems arise. This approach provides a certain degree of flexibility, but also carries the risks of being ill-considered and reactive.

At the same time, there has been a gradual realisation of the importance of strategic thinking, even for small firms. Small business owners are increasingly aware of the importance of strategic management and are showing interest in implementing its tools. Research shows that having a clear strategy and a proactive approach has a positive impact on the performance of small businesses. In particular, it has been found that the growth and profitability of small firms correlate significantly with how innovative their product and market position is and how analytical and proactive their decision-making style is – that is, whether they are guided by a predefined strategy. In other words, by planning strategically, small businesses have a better chance of success and growth.

The challenges faced by small enterprises have led to certain characteristics in their strategies: combining different approaches and flexibility. Studies show that most SMEs do not adhere to «pure» strategies (only price leadership or only differentiation), but rather combine different competitive strategies. This allows them to manoeuvre in the market in search of their niche. It has also been found that as the uncertainty of the environment increases, small firms tend, on the contrary, to intensify their strategic activity – to search more intensively for competitive advantages. Thus, today's small entrepreneurs strive to be «strategists»: they monitor market changes, try new marketing methods, and implement innovations, even if this happens informally.

Global experience also has a significant impact on Ukrainian practice. New ideas are becoming available: Lean Startup – a concept of rapid testing of business hypotheses with minimal costs; design thinking – a focus on customer needs when developing a product; frameworks such as SWOT analysis and PESTEL for strategic analysis of the environment. Ukrainian small entrepreneurs are adopting these methods through business literature, seminars, and consulting. Particularly progressive companies are introducing KPI systems and balanced performance indicators (similar to the Balanced Scorecard) even at their level to monitor the achievement of strategic goals not only in finance, but also in customer relations, business processes, and staff development.

The state has also recognised the role of small businesses in economic stability. In 2024, the Cabinet of Ministers of Ukraine approved a Strategy for the Recovery, Sustainable Development and Digital Transformation of SMEs for the period up to 2027[5]. This strategy provides, in particular, for the active introduction of innovation, digital technologies and «build back better» principles in the reconstruction of businesses after the war. This strategy emphasises the «green transition», digitalisation and innovative development, as well as the inclusiveness of entrepreneurship. It provides for the digitisation of SME business processes, the introduction of artificial intelligence technologies, electronic document management and instant payments – all of which should increase the efficiency and sustainability of small businesses. The state and international partners are also focusing on developing the skills of entrepreneurs (education, digital literacy training) and improving access to financing for innovation.

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[5] *Cabinet of Ministers of Ukraine. (2024). Strategy for the recovery, sustainable development and digital transformation of small and medium-sized enterprises until 2027. https://zakon.rada.gov.ua/laws/show/821-2024-%D1%80#n14*

The modern innovative model of smart management for small businesses involves a comprehensive approach to management, where marketing communications, operational (logistical) activities and digital management processes are considered not separately, but in an interconnected manner. In practice, this means that the strategy of a small enterprise is formed at the intersection of these areas, creating a synergy effect. For example, the successful implementation of a market penetration strategy requires effective marketing (promotion of the product through digital channels and social networks), well-established logistics (timely delivery of goods, optimisation of stocks), and modern technological solutions for management (order automation, CRM systems for working with customers).[6]

Currently, small businesses are actively embracing digital marketing – social media presence, content marketing, email newsletters, search engine optimisation. These are inexpensive but effective tools for reaching your target audience. In Ukraine, there are more and more examples of small firms building their brand through social media and online communities. Research shows that one of the key problems with using social networks in business is the lack of a clear SMM (social media marketing) strategy. Therefore, the need for a strategic approach to marketing communications is now coming to the fore – campaign planning, image management, and analysis of customer behaviour through analytics data.[7]

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[6] *Lavrynenko, S., Tarasovych, L., & Zelinska, A. (2025). Social entrepreneurship as an innovative component of post-war business. Efektyvna ekonomika, (4). https://doi.org/10.32702/2307-2105.2025.4.52*

[7] *George Abuselidze, Liudmyla Tarasovych, Maryna Yaremova, Tetiana Usiuk, Svitlana Lavrynenko, Anna Slobodianyk. (2025). Imperatives of Social Marketing in the Context of Rural Entrepreneurship. Sustainable Development and Green Innovation Managing Risk Through Interdisciplinary Approaches and Policy Strategies, PP. 127–146. DOI: https://doi.org/10.1108/978-1-83608-462-420251006.*

Another important component is logistics optimisation. For small businesses, especially manufacturing or trading companies, it is critical to effectively manage supplies, inventories and product delivery. Traditionally, small businesses have been at a disadvantage compared to large ones due to their inferior logistics infrastructure, but modern technologies are partially levelling the playing field. For example, the use of supply chain management services (some available as cloud-based SaaS solutions) allows even small companies to optimise delivery routes, track inventory in real time and minimise costs. Express delivery services that cooperate with small businesses (logistics platforms, last-mile services, etc.) are developing in Ukraine. The state strategy for SMEs until 2027 emphasises the creation of clusters and value chains involving small enterprises, which means integrating small manufacturers and suppliers into joint logistics networks, where the efficiency of each participant increases the stability of the entire system. Therefore, small businesses are now advised to implement the principles of logistics optimisation.

Digital transformation of management is essentially the foundation of smart management, as digital technologies permeate both marketing and logistics. This refers to the use of IT solutions for automation and decision support in all functions of the enterprise. For small firms, cloud accounting, CRM, and e-commerce systems are particularly relevant, as they do not require large capital investments. The introduction of even simple digital tools can significantly increase productivity: studies show that digitising business processes leads to time savings, cost reductions and expanded markets for SMEs. Globally, 75% of companies plan to move to e-commerce and digital commerce in the coming years to expand their access to customers. Ukrainian small businesses are also actively digitising: experts estimated the

average level of business digitisation in Ukraine in 2021–2022 at ~56 points out of a possible 100[8].

This indicates that there is significant potential for further digital transformation. It is also important that the state and donor programmes are currently offering small businesses assistance in digitisation: from training projects to grants for the implementation of IT solutions. Efforts are also focused on improving the digital security of small businesses, as the growth in online activity brings with it an increased risk of cyberattacks, data leaks, and other threats. Overall, digital transformation for small businesses means moving from paper-based and manual processes to automated ones, and from intuitive decisions to data-driven decisions. This approach significantly strengthens strategic management: owners receive up-to-date information on all aspects of their business and can quickly adjust their strategy.

In international practice of strategic management of small businesses, several current trends can be identified that are shaping the «model of the future». These include: a focus on sustainability; digitalisation and digital strategies; smart management and integration of functions; network strategies and collaboration.

Based on global trends, an innovative model of strategic management of small businesses is being developed, which the Ukrainian economy is striving to achieve. It assumes that small businesses operate «like large ones» in terms of management professionalism, but retain their key advantage – flexibility. In this management model, marketing, logistics and digital technologies are closely linked. Marketing communications shape demand and maintain customer loyalty, the logistics system quickly delivers

[8] *Dykan, O. V., Krykhtina, Yu. O., & Frolova, N. L. (2021). Current methods of strategic analysis of the enterprise business environment. Pryazovskyi Economic Bulletin, 1(24), 78–81. http://lib.kart.edu.ua/handle/123456789/23963*

goods or provides services, and digital tools ensure the efficiency of each process and the transparency of data for decision-making. This synergy creates the Smart Enterprise effect – an intelligent enterprise capable of rapid adaptation and scaling.

Thus, the evolution of strategic management concepts has gone from simple budget planning to modern integrated smart management models. Small businesses, albeit with some lag, have gradually adopted these concepts and begun to actively apply them in practice. Today, small businesses in Ukraine need to realise the strategic importance of innovation and digitalisation for their development. The experience of developed countries shows that strategic management is not a luxury, but a necessity for the survival and growth of SME.

Ukrainian practice confirms that despite all the difficulties (economic crises, war), flexible small businesses are able to adapt and find new opportunities. The integration of marketing, logistics and digital technologies within a single strategy gives small businesses a chance to increase their efficiency and competitiveness. Government efforts to support small businesses (stimulating digital transformation, simplifying regulation, development grants) create favourable conditions for the implementation of strategic management on a mass scale.

Thus, the concepts of strategic management in small businesses have evolved from basic to high-tech and complex. Today's small business owners have the tools to plan like big players, and they should use them. Combining forward-looking planning with the ability to change course quickly is the formula for small business success in the 21st century. Ukrainian small businesses need to catch up in terms of their contribution to the economy, and they can do so through smart strategic management using the best global practices and innovations.

1.2. The essence and key characteristics of SMART management

The modern business landscape is characterised by unprecedented speed of change, market globalisation and total digitalisation. Industry 4.0 technologies, such as the Internet of Things (IoT), artificial intelligence (AI), big data, and cloud computing, are fundamentally changing not only production processes but also the very logic of organisational management. Traditional, hierarchical management models based on long-term planning and directive control are proving incapable of responding adequately to dynamic challenges.

The term «smart management» is often misinterpreted, reducing it to the use of new software or automation. In fact, its essence is much deeper. Smart management is a comprehensive management philosophy and system based on the integration of digital technologies, big data analysis, and flexible methodologies with the aim of making proactive, informed decisions in real time to achieve the organisation's strategic goals.

Key to this definition is the shift from reactive management (responding to problems that have already occurred) to predictive and proactive management (anticipating problems and opportunities based on data analysis).

While traditional management was based on hierarchy, clear instructions and control over execution (which was effective in a stable industrial economy), smart management is based on:

1) Data – decisions are made not on the basis of intuition or past experience of the manager, but on the basis of objective data analysis;

2) Networks – hierarchical structures give way to flexible, project teams and horizontal interaction;

3) Velocity – decision-making and feedback cycles are reduced to a minimum.

For a better understanding of the differences, let us conduct a comparative analysis (Table 1.2.1).

Table 1.2.1. Comparative characteristics of traditional and smart management[9;10]

Comparison criteria	Traditional management	Smart management
Basis for decisions	Intuition, experience, reports for previous periods, instructions.	Real-time data, Big Data, predictive analytics, AI.
Structure	Hierarchical, linear-functional, stable.	Networked, agile, project-based, adaptive.
Communications	Vertical («top-down»), formalised.	Horizontal and vertical, informal, instant (messengers, platforms).
Focus of control	Control over the execution process, compliance with regulations.	Control over results, real-time monitoring of key performance indicators (KPI).
Response to change	Reactive, slow, resistant to change.	Proactive, predictive, continuous adaptation.
Leadership	Directive (manager-boss).	Transformational, servant (manager-coach, facilitator).
Use of technology	Automation of certain routine tasks (accounting, document flow).	Integrated cyber-physical system (IoT, AI, Cloud), end-to-end digitalisation.

[9] *Dykan, O. V., Krykhtina, Yu. O., & Frolova, N. L. (2021). Current methods of strategic analysis of the enterprise business environment. Pryazovskyi Economic Bulletin, 1(24), 78–81. http://lib.kart.edu.ua/handle/123456789/23963*

[10] *Porter, M. (2020). Competitive strategy: Techniques for analyzing industries and competitors (Ukrainian translation). Nash Format.*

An analysis of scientific sources and business practices allows us to identify five fundamental characteristics that define the essence of smart management:

1. Data-driven.

This is the most important feature. Smart management is impossible without the ability to collect, process, analyse and, most importantly, interpret huge amounts of data (Big Data). Companies are moving from descriptive analytics («What happened?») to predictive («What could happen?») and prescriptive («What should we do?») analytics. Managers are becoming analysts who «see» the business through the prism of digital indicators (dashboards).

2. Agility & Adaptability.

Smart systems are not static. They are built on Agile and Lean principles, which allow you to quickly rebuild processes, change priorities, and test hypotheses (PDCA/OODA cycles). This is management in «permanent beta» mode, where change is the norm, not a crisis.

3. Technology-Enabled & Integrated.

Smart management is inseparable from the technology platform. It is not just a set of software, but a unified ecosystem:

- *IoT (Internet of Things).* Sensors that collect data from the physical world (equipment, logistics, customers).
- *Cloud (Cloud technologies).* Provide access to data and computing power from anywhere.
- *AI (Artificial Intelligence).* Analyses data, finds patterns, automates decision-making and provides recommendations.
- *Digital Twins.* Creation of virtual models of processes or objects for simulation and optimisation.

4. Proactive & Predictive.

Instead of waiting for a customer complaint or equipment failure, a smart system predicts these events. Examples:

predictive maintenance of equipment based on sensor data; predicting customer churn based on analysis of their behaviour.

5. Human-Centric & Connected.

Paradoxically, people are at the heart of high-tech smart management. Technology frees people from routine tasks so they can focus on creative, strategic tasks. Management focuses on creating an environment for collaboration, talent development, and ensuring the smooth exchange of information between all links in the organisation.

Despite the obvious advantages, the transition to smart management is a complex process. The main challenges include:

- *Resistance to change.* Cultural barriers and the reluctance of staff (especially middle management) to abandon familiar working methods.
- *Technological complexity and cost.* The implementation of integrated systems requires significant investment and a high level of technical competence.
- *The problem of «data quality».* The effectiveness of a smart system directly depends on the completeness, accuracy and relevance of data. «Garbage in, garbage out» (GIGO).
- *Staff shortages.* There is a need for a new type of specialist who combines management skills with an understanding of data science and digital technologies.
- *Security.* The concentration of critical data in unified systems increases the risk of cyberattacks and information leaks.

Let us systematise these characteristics and related tools in Table 1.2.2.

Table 1.2.2. Key characteristics and implementation tools of Smart Management[11;12]

Characteristics	Essential description	Key tools and technologies
1	*2*	*3*
Data-driven	Making decisions based on objective data analysis rather than intuition.	Big Data, Business Intelligence (BI), dashboards, A/B testing.
Agile	The ability to quickly change processes and priorities in response to changes in the environment.	Agile (Scrum, Kanban), Lean, DevOps, project management methodologies.
Technology-enabled	Using advanced digital technologies as the basis for management processes.	Artificial intelligence (AI), machine learning (ML), cloud platforms.
Integrated	Creating a unified information space where data flows freely between systems.	ERP, CRM, SCM системи, ERP, CRM, SCM systems, Internet of Things (IoT), API (application programming interfaces).
Predictive	Focus on predicting future events and responding proactively.	Predictive analytics, what-if analysis, digital twins.

[11] *Artiushok, V. (2022). Methods and models of strategic analysis in the business planning system. Economy and Society, 44, 44–61. https://doi.org/10.32782/2524-0072/2022-44-61*

[12] *Makovetska, I. M., Baidin, M. V., & Korol, V. O. (2022). Improving tools of strategic analysis in enterprise management. Economics. Management. Business, 3–4, 67–71. https://surl.li/lwxpxb*

Continuation of table 1.2.2

1	*2*	*3*
Human-centric	Focus on staff development, collaboration, and improving the customer experience.	Collaboration platforms (Slack, Teams), knowledge management systems, CRM, CX (Customer Experience) platforms.

Overcoming these barriers requires not just the purchase of new software, but a comprehensive transformation of corporate culture, business processes and organisational structure, namely:

1. Smart management is the highest form of evolution in management thinking in the era of digital transformation. It goes beyond simple automation, offering a new management philosophy based on the synergy of data, technology, and human intelligence.
2. The essence of smart management lies in the transition from hierarchical, reactive management to a flexible, networked and proactive model, where decisions are made based on predictive real-time data analysis.
3. The key, interrelated characteristics of smart management are data-driven, agile, integrated, predictive and human-centric.
4. A comparative analysis has revealed a fundamental gap between traditional and smart paradigms in all key aspects: from structure and communications to the basis for decision-making.
5. The implementation of smart management is an inevitable condition for the survival and development of companies in the 21st century. It is a complex transformation process that requires significant investments not only in technology, but also in the development of corporate culture and new competencies.

Prospects for further research lie in the development of practical models and roadmaps for the implementation of smart management in enterprises of various industries, as well as in the study of ethical aspects of management based on artificial intelligence.

1.3. Theoretical approaches to the integration of marketing communications, logistics and digital technologies

In the era of the digital economy, consumers expect not only high-quality goods, but also impeccable service at all stages of interaction with the brand. They want to see personalised advertising (marketing communications), place orders in two clicks on a convenient platform (digital technologies) and receive them exactly at the promised time and place (logistics). Any failure in this chain (for example, the website shows that the product is available, but it is not in stock; or the advertisement promises delivery «tomorrow», but logistics cannot provide it) leads to a ruined customer experience and loss of the customer.

The traditional organisational structure, where the marketing department, IT department and logistics department work in isolation, each with their own KPIs, is becoming a major barrier to efficiency. There is an urgent need for theoretical understanding and practical implementation of models that integrate these three areas.

The relevance of the topic is due to the fact that competition has shifted from «product versus product» to «supply chain versus supply chain» and «customer experience versus customer experience». The success of companies such as Amazon and Zappos is based precisely on the seamless integration of marketing, logistics and IT.

Integration processes have developed in parallel in marketing and logistics.

1. *Integrated marketing communications (IMC):* the first level of integration. The goal is to «speak with one voice». All channels (advertising, PR, SMM, email) must convey a consistent message. This is information integration.

2. *Supply chain management (SCM):* integration of physical and related financial and information flows. The goal is to optimise the movement of goods from the raw material supplier to the end consumer.

3. *Customer relationship management (CRM):* this was the first attempt at technological integration, where the CRM system combined data on sales, service and marketing contacts.

However, these concepts still left a «gap». Marketing (IMC and CRM) was responsible for the promise made to the customer, while logistics (SCM) was responsible for its fulfilment. Often, these two processes were not synchronised.

The theoretical approach that finally brought these worlds together was the concept of omnichannel. Unlike multichannel (the presence of many separate channels – store, website, app), omnichannel provides a single, seamless experience. A customer can start interacting in one channel (saw an ad on Instagram), continue in another (placed an order in a mobile app), and finish in a third (returned the product to a physical store).

This model is impossible if:

- Marketing communications (Instagram) are unaware of the order status.
- Logistics (warehouse) does not see data from the mobile app in real time.
- Digital technologies (ERP/CRM system) do not combine data from all points of contact.

Thus, omnichannel becomes a leading theoretical framework that requires deep integration of MC, logistics and DT.

Integration takes place on three levels:

1. *Strategic (alignment of goals).* For example, the marketing strategy for entering a new market (MK) must be synchronised with the strategy for developing logistics infrastructure (logistics) and the choice of digital platform (CT).

2. Process. (Building end-to-end business processes). A classic example is the «Order-to-Cash» process, which goes through MK (lead/order receipt), DT (processing in the system) and logistics (picking, delivery).

3. Information. (Creation of a unified information space). This is the key role of digital technologies. Data should not «live» in separate systems (Excel for the marketer, 1C for the accountant, WMS for the storekeeper).

Let's consider a comparative characteristic of traditional (siloed) and integrated approaches (Table 1.3.1).

If omnichannel is a structure, then Customer Experience Management (CXM) is the philosophy and goal of integration. CXM considers not individual functions (marketing, logistics), but the entire customer journey – from the moment of awareness of a need to after-sales service.

In this model, the integration of MK, logistics and CT is not an end in itself, but a necessity:

- MK (Marketing) is responsible for the «Awareness» and «Consideration» stages.
- CT (E-commerce platform) is responsible for the «Purchase» stage.
- Logistics is responsible for the «Receipt» stage.
- MC + CT (CRM, service) are responsible for the «Loyalty» and «Advocacy» stages.

Table 1.3.1. Comparative analysis of traditional and integrated approaches[13;14]

Criterion	Traditional («siloed») approach	Integrated (omnichannel) approach
1	*2*	*3*
Key objective	Functional optimisation (e.g., minimising logistics costs, maximising MK coverage).	Maximising customer experience (CX) and lifetime value (LTV).
Marketing communications (MC)	«Promise». Generates demand, often isolated from actual inventory and delivery capabilities.	«Conversation». Personalised communications based on real data (product availability, delivery status).
Logistics	«Execution.» Reactive function, «cost centre» Fulfils orders received.	«Part of the promise» Proactive function, service centre» Speed and quality of delivery are part of the marketing proposition.

[13] Volkova, N. V., Harkava, V. F., & Skorokhod, I. P. (2023). The role of digital processes in the innovative development of Ukrainian business: An economic aspect. Academic Visions, 19, 1–9. https://doi.org/10.5281/zenodo.7908023

[14] Kushnirenko, O., & Kushnirenko, Ye. (2023). Achieving Ukraine's digital autonomy as a strategic vector of integration with the EU. Scientific Bulletin of the International Association of Scientists. Series: Economics, Management, Security, Technologies, 2(1). https://doi.org/10.56197/2786-5827/2023-2-1-3

Continuation of table 1.3.1

1	*2*	*3*
Digital technologies (DT)	Disparate systems (CRM, ERP, WMS not synchronised). Automation of individual tasks.	Single integrated platform (API, cloud services). «Digital glue» that provides real-time data flow.
Data flow	Unidirectional, fragmented, delayed (reports).	Two-way, end-to-end, real-time.
Customer experience	Fragmented, «gaps» between channels and stages.	Seamless, holistic.

Digital technologies act as a catalyst that allows not only to unite, but also to optimise this path (Table 1.3.2).

In the digital economy, there is a fundamental shift from functional («silo») management to integrated management. Isolated optimisation of marketing communications or logistics leads to sub-optimisation of the system as a whole and the destruction of the customer experience.

The theoretical basis for integration has evolved from narrow concepts (such as IMC) to comprehensive models that cover the entire business. The leading theoretical approaches describing this integration are the concept of omnichannel (as a structural model) and customer experience management (CXM) (as a philosophy and target function).

The traditional conflict between marketing (which strives for variety and personalisation) and logistics (which strives for standardisation and economy) is being resolved thanks to digital technologies. They act as a «digital glue» that enables «mass customisation» in both communications and physical delivery.

Table 1.3.2. The role of key digital technologies in the integration of marketing communications and logistics[15;16;17]

Digital technology	Integration for the benefit of Marketing Communi-cations	Integration for the benefit of logistics	Key effect of integration
1	*2*	*3*	*4*
Big Data, AI	Predictive behavioural analytics, hyper-personalisation of offers.	Demand forecasting, route and inventory optimisation.	Proactivity: MK data (e.g., SMM trends) is used by AI to forecast demand and proactively move goods (Logistics).
Internet of Things (IoT)	«Smart» products that transmit usage data (for upselling).	Real-time cargo monitoring («smart» warehouse, WMS).	Transparency: data from the IoT tracker (Logistics) is instantly transmitted to the customer in the application (CM) as «Courier will be there in 10 minutes».

[15] Volkova, N. V., Harkava, V. F., & Skorokhod, I. P. (2023). The role of digital processes in the innovative development of Ukrainian business: An economic aspect. Academic Visions, 19, 1–9. https://surli.cc/njlxyg

[16] Kushnirenko, O., & Kushnirenko, Ye. (2023). Achieving Ukraine's digital autonomy as a strategic vector of integration with the EU. Scientific Bulletin of the International Association of Scientists. Series: Economics, Management, Security, Technologies, 2(1). https://surl.li/betsqt

[17] Ostrovska, H. Y., & Ostrovskyi, O. T. (2023). Artificial intelligence in modern enterprises and marketing campaigns: Effective tools and development prospects. Marketing and Digital Technologies, 7(3), 66–82. https://doi.org/10.15276/mdt.7.3.2023.5

Continuation of table 1.3.2

1	*2*	*3*	*4*
CRM / CDP (Customer Data Platform)	Single customer profile, communication history.	Order history, delivery preferences, addresses.	Single view of the customer (360-View): the service manager (MC) sees not only complaints, but also the exact status of all orders (Logistics).
Cloud platforms and API	Quick connection of new marketing channels (e.g., TikTok).	Quick integration with 3PL operators and delivery services.	Flexibility and scalability: the ability to quickly build complex ecosystems where the website (MC) «communicates» with the Nova Poshta system (Logistics).
Blockchain	Building trust, confirming authenticity (PR).	Track & trace, supply chain transparency.	Proven authenticity: the marketing promise of an «organic product» (MK) is confirmed by an unalterable record in the blockchain about the path of the goods (Logistics).

Analysis shows that an integrated approach changes the very essence of functions: logistics becomes part of the marketing proposition and a service tool, while marketing communications become driven by data coming from, among other sources, logistics systems.[18]

Prospects for further research lie in the development of specific organisational models and end-to-end KPIs that would allow companies to manage integrated processes, as well as in the study of barriers (technological, cultural, organisational) to such integration.

[18] *Lavrynenko, S., Zelinska, A., Tarasovych, L., & Bilych, V. (2025). Digitalization and transparency: Innovative activity in logistics management. Sustainable Development of the Economy, 3(54), 58–63. https://doi.org/10.32782/2308-1988/2025-54-9*

CHAPTER 2

CURRENT TRENDS IN SMALL BUSINESS DEVELOPMENT IN THE DIGITAL ECONOMY

СУЧАСНІ ТРЕНДИ РОЗВИТКУ МАЛОГО БІЗНЕСУ В УМОВАХ ЦИФРОВОЇ ЕКОНОМІКИ

The article analyses current trends in small business development in the digital economy, taking into account transformational changes in the technological, institutional and competitive environments. The key challenges and opportunities of digital transformation for small businesses are revealed. The role of digital technologies in increasing the productivity, flexibility and market adaptability of small businesses, as well as the need to review traditional business models, is substantiated. Considerable attention is paid to marketing communications as a tool for building the competitiveness of enterprises in the digital environment, in particular the development of an omnichannel approach and innovative forms of interaction with consumers. Logistical innovations are examined as a factor in improving the efficiency of small businesses, with an emphasis on digitalisation, automation and analytical support for management decisions. It is concluded that the integration of digital, marketing and logistical innovations forms the strategic basis for the sustainable development of small businesses.

Проаналізовано сучасні тенденції розвитку малого бізнесу в умовах цифрової економіки з урахуванням трансформаційних змін у технологічному, інституційному та конкурентному середовищах. Розкрито ключові виклики й можливості цифрової трансформації для малих підприємств. Обґрунтовано роль цифрових технологій у підвищенні продуктивності, гнучкості та ринкової адаптивності малого бізнесу, а також необхідність перегляду традиційних бізнес-моделей. Значну увагу приділено маркетинговим комунікаціям як інструменту формування конкурентоспроможності підприємств у цифровому середовищі, зокрема розвитку омніканального підходу та інноваційних форм взаємодії зі споживачами. Досліджено логістичні інновації як чинник підвищення ефективності малого підприємництва, з акцентом на цифровізацію, автоматизацію та аналітичну підтримку управлінських рішень. Узагальнено, що інтеграція цифрових, маркетингових і логістичних інновацій формує стратегічну основу стійкого розвитку малого бізнесу.

2.1. Challenges and opportunities of digital transformation for small businesses

Digital transformation is becoming a determining factor in the development of small businesses in the context of technological change. The use of digital services, automation and data analytics opens up new tools for small companies to increase efficiency, expand markets and optimise processes. At the same time, rapid technological changes pose a number of challenges: the need for financial investment, a lack of digital skills, cybersecurity risks, and the need for continuous adaptation. Therefore, digital transformation for small businesses combines significant opportunities for development with the requirement for strategic readiness for change and flexible response to digital trends.

In addition, the government approved the Strategy for the Recovery, Sustainable Development and Digital Transformation of Small and Medium-sized Enterprises (SME) for the period up to 2027, as well as an operational plan for its implementation for 2024–2027. The Strategy defines the key areas of state policy in the field of SMEs, including the recovery of destroyed enterprises according to the «build back better» principle. Particular attention is paid to green transition, digital transformation, innovative development and business inclusiveness, involving women, people with disabilities, internally displaced persons (IDPs) and veterans.

The strategy contains the following main objectives:

- *Restoring and facilitating the process of doing business:* access to capital, deregulation and the introduction of new support tools. This will be facilitated by the Made in Ukraine public policy programmes: grants for processing enterprises, Accessible Loans 5–7–9, and opportunities for insurance against military risks. New programmes are being added to existing ones, such as greater involvement of SMEs in public

procurement. Deregulation and new communication channels, such as the Pulse platform, will improve the quality of public services;

- *Innovative development, digital transformation and green transition:* approaches to smart specialisation, the creation of industry clusters and science parks have been laid down, which will help attract investment and promote regional development. These processes will be reinforced by the digitalisation of business processes, artificial intelligence technologies, electronic invoicing tools, and instant payments by the National Bank, provided that cybersecurity is ensured. To promote the green transition of SMEs, an online tool for self-assessment of the carbon footprint of enterprises and professional energy audits will be introduced;
- *Human capital and entrepreneurship development:* dual education and programmes for women, veterans, and people with disabilities. Expansion of the network of regional offices of «Made in Ukraine» to support micro and small enterprises;
- *Increasing competitiveness and exports:* cooperation with international networks such as Enterprise Europe Network, Erasmus for Young Entrepreneurs, development of the «Made in Ukraine» brand, providing support in finding partners, conducting negotiations and launching joint chains, expanding the activities of the Export-Credit Agency.[19]

Table 2.1.1 shows the possibilities for integrating digital technologies into key business processes to improve customer interaction and support innovative development.

[19] *Cabinet of Ministers of Ukraine. (2024). Resolution on the approval of the Strategy for the recovery, sustainable development and digital transformation of small and medium-sized enterprises until 2027 and the approval of the operational action plan for its implementation in 2024–2027. https://surl.lt/xvmaim.*

Table 2.1.1. Integration of digital technologies into the business processes of small enterprises[20;21;22]

Area of activity	Approach to the use of digital technologies	Expectations
Customer service	Digital CRM systems, chatbots	Optimisation of customer interaction
Operational management	Process automation, cloud solutions	Optimisation of work processes, reduction of costs
Research and development	Data analytics, artificial intelligence	Innovation, research efficiency, development of new products
Logistics and inventory management	Digital inventory management, GPS monitoring	Improved logistics process efficiency and inventory control accuracy
Finance and accounting	Electronic accounting and digital payment platforms	Optimisation of financial processes and fast transaction execution
Communications and internal interaction	Corporate messengers, video conferencing, cloud documents	Fast information exchange, transparent communications, reduced bureaucracy
Personnel and HR management	HRM systems, digital recruiting, automated schedules	Optimisation of personnel management, easier hiring, reduced administrative costs

[20] *Haluzevi trendy. (2024). State of the logistics industry in Ukraine: Trends and features. https://surl.li/djvxzr*

[21] *Ivanyshyn, O. V. (2020). Innovative business models of logistics support for enterprise development. Innovative Economy, 7–8. https://surl.li/wkvqqq*

[22] *Innovations in logistics activities, their advantages and disadvantages. (2020). https://surli.cc/fwtvwh*

The successful implementation of digital tools allows small businesses to increase productivity, automate routine operations, reduce costs, and respond more quickly to customer needs. At the same time, digital transformation requires a rethinking of traditional business models. After all, small businesses need to implement new ways of working: digital communication, online sales, remote customer service, and the use of cloud platforms and analytical systems. This requires not only technical solutions, but also the development of a digital culture, staff readiness for training, and flexible change management.

Digital technologies are rapidly changing the modern world, transforming the way we do business, communicate and organise production processes. They have become an integral part of everyday life – from online shopping and digital services to automated solutions in the private and public sectors. Digital transformation is now a strategic priority for many countries, and in the European Union, its development is guided by the Digital Decade programme, which sets out key benchmarks for digital progress until 2030.

These processes are particularly important for small businesses. Digitalisation opens up access to new tools that were previously only available to large companies: online platforms, cloud services, data analytics, sales and communications automation. The implementation of digital solutions allows small businesses to: reduce operating costs through automation and process optimisation; expand their markets by going online and working with customers around the world; improve customer service using CRM systems, chatbots and personalisation; increase productivity through cloud technologies, digital documents, and mobile solutions; respond quickly to changes through data analytics, demand forecasting, and digital monitoring.

2.2. Marketing communications in shaping the competitiveness of an enterprise

Marketing communications play a key role in ensuring the competitiveness of an enterprise, as they are a multifaceted process that stimulates the movement and promotion of goods at all stages of operation. The use of marketing communications aims to increase brand awareness, help build relationships with the target audience, and establish an emotional connection.

The main communication goals include: increasing sales: motivating people to buy; strengthening the company's position: creating the right image and associations for consistent and effective communication with the audience; conveying information: informing the audience about new products, improvements to existing ones, the start of sales, and the availability of unique offers; differentiation from competitors: conveying relevant information to consumers (about the advantages and uniqueness of the company and/or its products), the opportunity to stand out from competitors and win the trust of potential customers; Building loyalty: through audience segmentation with the ability to send personalised content and relevant offers; Virality: the speed of spreading information about the company or its products, creating viral content.

The implementation of a promotion complex largely depends on the strategy chosen by the manager: pushing or pulling. The product pushing strategy involves intensive stimulation of the trade sector to promote the product through the distribution channel. The manufacturer actively pushes the product to wholesalers, who actively work with retailers, who actively stimulate sales of the product to consumers. The pull strategy involves significant spending on advertising and consumer incentives to create demand for the product.

The final stage of implementing a promotion complex in the company's activities is determining the budget. The main methods include: the sales-oriented method: the budget size is determined as a percentage of either last year's sales, expected sales for the future period, or average sales over several years; the residual principle method: the budget is determined as the difference between the total marketing budget and all other marketing expenses; the competitor parity method: to determine the budget, the company uses the corresponding expenses of its competitors, but often faces a lack of reliable information about the communication activities of its competitors and their actual expenses; Weinberg model: using regression analysis, the dependence of changes in a company's market share on the ratio of advertising costs in the company's sales to the corresponding indicator of a competitor is studied, which makes it possible to establish the advertising budget necessary to increase market share; Goals and objectives method: involves specifying goals and developing measures necessary to achieve them, with the advertising budget determined as the sum of expected costs for measures whose implementation will enable the goals to be achieved.[23]

The completion of the promotion complex formation system involves its evaluation with the determination of sales volumes determined by each additional monetary unit (hryvnia) spent on advertising, sales promotion, public relations, and personal sales. Given the difficulty of determining such indicators, the effectiveness of each element is estimated approximately by

[23] *Tarasovych, L. V. (2022). Explication of social marketing. In Management, marketing, logistics: Trends and overcoming challenges (Pt. 2, pp. 36–38). Zhytomyr: Polissia National University.*

studying consumer awareness, their loyalty to the brand, and preferences.[24]

The application of communication tools in the enterprise's activities is shown in Fig. 2.2.1.

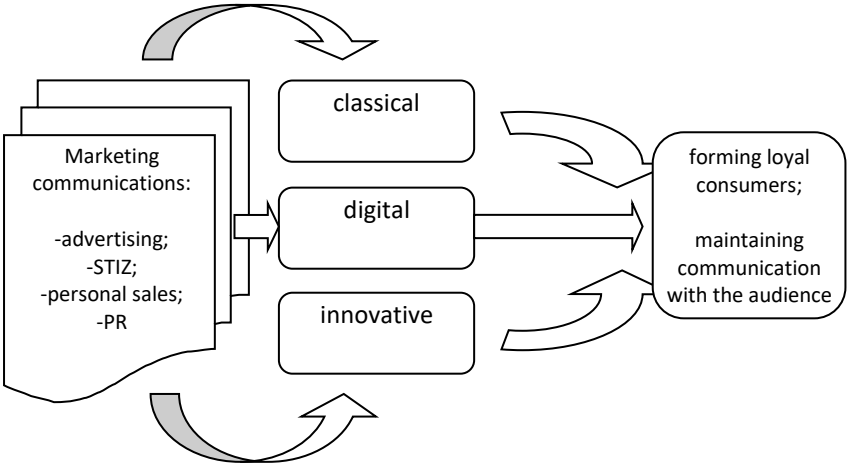

Figure 2.2.1. Application of communication tools in business activities

In the context of digital transformation and rapid technological development, modern Ukrainian enterprises are objectively faced with the need to adapt to new formats of interaction with consumers. Traditional marketing communication models do not provide the required level of effectiveness, as consumers expect fast, convenient and personalised interaction through various channels – online, offline, mobile platforms and social networks. In view of this, there is a need to implement an omnichannel approach that

[24]*Korol, I. V. (2017). Marketing communications: Educational and methodological manual. Uman: VPC "Vizavi".*

ensures a unified and consistent customer experience. However, in the Ukrainian context, the implementation of such strategies faces a number of challenges: insufficient digital maturity of companies, limited resources, lack of adequate IT infrastructure and experience. This raises the issue of implementing omnichannel marketing and communication tools in practice to increase the competitiveness of Ukrainian enterprises in the face of fierce competition and behavioural transformation among consumers.[25]

Therefore, along with classic tools, it is worth implementing a system of innovative techniques and methods that will allow you to: expand the circle of existing consumers and increase the percentage of potential (latent) ones through creativity in presenting information about a product or service; offer individualised and non-standard approaches to solving the buyer's problem; conquer the market in a short time; create unobtrusive advertising messages (based on sending information according to preferences); form a customer base with specific needs of the target audience; increase consumer loyalty; save budget expenses on advertising activities through the use of information technologies. Among the main innovative tools capable of improving the activities of a modern enterprise, the following stand out:

- *Virtual promoter:* a technically innovative advertising invention that is a full-length video model of a person, created using modern technology. Such a model evokes strong emotions in buyers and leaves a vivid image of the product

[25] *Tarasovych, L. V. (2022). Social marketing in Ukraine: Essence, technologies, and implementation challenges. In Accreditation of educational programs in the economic field under wartime conditions: Proceedings of the All-Ukrainian scientific and pedagogical advanced training in economic sciences (pp. 65–66). Lviv–Toruń: Liga-Pres. https://doi.org/10.36059/978-966-397-259-6-18*

presented in the video clip in their minds, during which the virtual promoter talks about the product or service;

- *Brand advocate:* a consumer who has used the product or service and had a positive experience. A brand advocate protects the interests of the developer and service provider or product manufacturer. A satisfied advocate who feels important to the brand is able to promote the brand more effectively than salespeople and marketers. This method of promoting a product (service) not only attracts the buyer's attention to the brand (trademark), but also expands the circle of potential consumers;
- *Storytelling:* detailed stories and narratives about previous work or actions of management, employee interactions, the lives of famous people, or events related to the brand (trademark). Such stories popularise the company and effectively influence the emotional component of the consumer, as they call for action and turn consumers into admirers of certain ideas and values. Potential consumers «try on» the image for themselves, wanting the story presented to become part of their own story;
- *Interactive floor (board):* a projected image that instantly reacts to human movement, bringing the image to life and revealing a hidden advertising message;
- *Foggy display:* a screen for projecting images through which a person can «pass into another dimension», i.e. such a screen instantly appears and disappears, which enhances the effect of surprise and captivates the viewer (potential consumer);
- *Interactive multi-touch table:* an interactive touch-controlled surface that allows potential buyers to accurately navigate their choice of product and receive virtual advice;
- *Projection film:* provides transmission of the projector signal, has high light transmission and diffusion

characteristics, which is confirmed by the clarity of colour reproduction. The film is widely used as an outdoor advertising medium. The shape of the film is limited only by the owner's imagination, so it allows you to differentiate your company's offering based on marketing communications;

- *Co-branding:* the combination of brands (trademarks) of several companies for mutually beneficial cooperation and gaining advantages in the fight against competitors;
- *Product positioning through hidden advertising:* consumer perception at a subconscious level and an alternative to direct advertising, which consumers tend to avoid due to its aggressiveness and intrusiveness. Information in hidden advertising influences the buyer on a subconscious level. The use of this technology requires professionalism in order to achieve a positive effect;
- *Cross-promotion:* the development and implementation of cross-promotion programmes for brands and trademarks is a logical continuation of the policy of product positioning through hidden advertising. Companies that place their product in an advertising video and show it to potential consumers while they are watching a film do not finance its promotion, but conduct large-scale advertising and PR campaigns aimed at simultaneously promoting the product and the film. Popular films with beloved characters make it possible to build a loyal audience that is of interest to the partner company.

Customer focus has transformed into a complex technological model that cannot be imagined without an omnichannel approach. This is not just about a company's presence in several communication channels, but about their full integration, which allows a person to switch from one format of interaction to another without interruptions, delays or loss of

context. A customer who started a dialogue in a messenger can continue it in a mobile application or on a hotline without having to explain the situation again. And this level of synchronisation is increasingly perceived not as an advantage, but as an expected standard. In some cases, there is also legal inertia – domestic market regulation does not always keep pace with the speed of digital change. As a result, the introduction of new communication formats faces uncertainty in terms of personal data, software licensing and consumer protection.[26;27]

It can be stated that the use of an omnichannel approach is highly effective. At the same time, its implementation directly depends on industry specifics, company size, and technological readiness. For small and medium-sized enterprises, the most important task today is to overcome internal barriers and find adaptive, cost-effective solutions that will contribute to the formation of a holistic customer experience in a changing market. However, in many cases, digital transformation is incomplete or superficial – companies implement tools without properly rethinking their processes. It is impossible to bridge this gap with technology alone. A set of actions is needed, and it goes far beyond automation. First and foremost, investment in human capital is needed. This applies not only to the training of marketers or contact centre operators: in many cases, there is a lack of digital awareness even at the top management level, which makes strategic decisions without understanding the logic of modern communication environments.

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[26] *Tarasovych, L. V., & Martynenko, T. O. (2024). Imperatives of using marketing technologies in the management system of a medical enterprise under the digitalization of business processes. City Development, 3(03), 90–96. https://doi.org/10.32782/city-development.2024.3-12*

[27] *Kravchuk, I. I., & Kovalchuk, V. V. (2025). Theoretical and methodological aspects of systemic marketing management in agribusiness. Economy and Society, (71). https://surl.li/vyczro*

Infrastructure challenges require special attention. They are particularly acute in regions where the quality of internet connectivity or the lack of IT specialists makes the omnichannel model almost unattainable. In addition, full integration is not always possible due to the unstable legislative environment. Imperfections in personal data storage regulations, weak support from government agencies, and bureaucratic delays in updating the IT environment do not contribute to modernisation. Only a well-designed and thought-out strategy can become the basis for a sustainable market advantage that is difficult to replicate or copy.

Therefore, in today's environment, digitalisation and innovation, especially in marketing communications, are the relevant trends for effectively influencing consumers. For the greatest effect when bringing a product (good/service) to market, maintaining its competitive position, and sustaining consumer interest in it, those companies that implement non-standard technologies for promoting products (goods/services) and use innovative forms of marketing communication when interacting with consumers achieve the best results.

2.3. Logistical innovations as a factor in improving the efficiency of small businesses

In the current economic climate, domestic enterprises need to transition to an innovative development model in order to improve their efficiency. This involves the systematic search for, preparation and implementation of innovations that can optimise the procurement, production and sales activities of enterprises. At the same time, a key condition is a fundamental transformation of management approaches and processes.

The implementation of innovative solutions is one of the main factors in increasing the competitiveness of products, the

efficiency of production resources and the adaptability of enterprises to changes in the external environment. They open up new opportunities for entering markets and ensure long-term stability and economic sustainability.

Logistical innovations play a special role in this process, allowing companies to increase the efficiency of both their production and non-production spheres. They ensure resource optimisation, cost reduction and improved customer service, taking the company to a new level of development. In this regard, research into the formation and implementation of logistics innovations in the enterprise management system is extremely relevant.

Logistics innovations include both technological and organisational innovations aimed at improving the efficiency of supply chains, reducing costs, optimising warehousing and transportation processes, improving inventory management and increasing customer service levels.

Logistics of innovation is not just the delivery of goods, but a complex system that ensures the effective management of resource, information and product flows at all stages of the innovation life cycle. It plays a key role in bringing new products to market quickly, adapting to changes in demand and ensuring the company's competitiveness.

Key areas of logistics innovation:

- Digitalisation of logistics: WMS systems, ERP, GPS monitoring, IoT sensors.
- Process automation: warehouse robotisation, inventory drones, automated transport solutions.
- Analytics and forecasting: use of artificial intelligence and Big Data to optimise routes and plan inventory.
- Organisational innovations: implementation of cross-docking, Just-in-Time, new supply management schemes.

- Improved customer service: automated communication platforms, CRM systems, online order tracking.[28]

The implementation of such innovations allows small businesses to increase operational efficiency, reduce transaction costs, decrease order processing time, and improve customer service quality.

Current trends in logistics are driven by the desire to optimise every stage, from production to delivery to the end consumer. This requires the implementation of innovative solutions that increase the speed, accuracy and transparency of logistics processes. The dynamics of key innovative solutions in logistics are presented in Fig. 2.3.1.

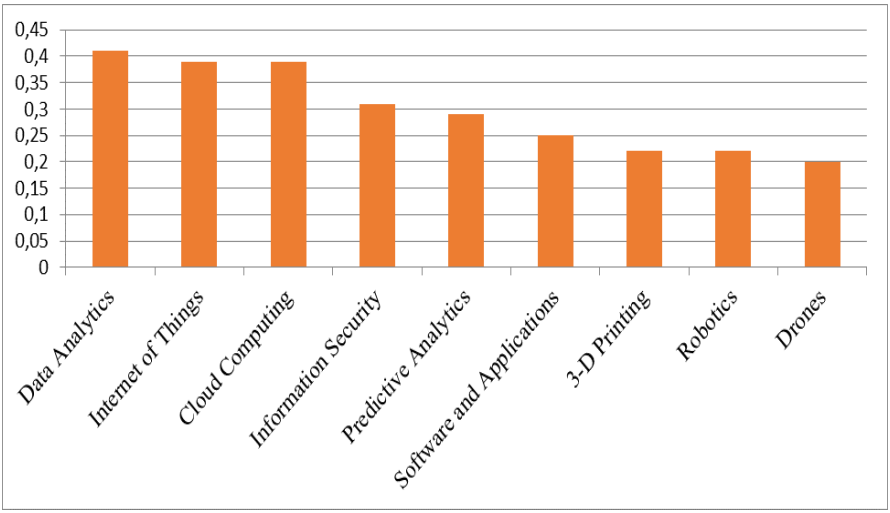

Figure 2.3.1. Dynamics of key innovative solutions in logistics[29]

[28] *Lavrynenko, S., Zelinska, A., Tarasovych, L., & Bilych, V. (2025). Digitalization and transparency: Innovative activity in logistics management. Sustainable Development of the Economy, 3(54), 58–63. https://doi.org/10.32782/2308-1988/2025-54-9*

As you can see, data analytics, IoT, and cloud computing are extremely important technologies in the digital world. They help companies increase the transparency of their supply chains. Some companies equip their fleets with sensors to receive real-time updates on transportation and delivery. This also allows for improved location and route management. In warehouses, IoT solutions contribute to better visibility of inventory management processes, storage conditions, and predictive maintenance.[30]

Cloud solutions allow companies to scale resources up or down depending on demand or market conditions. One of the main advantages of using the cloud is the ability to centralise analytics while decentralising data collection and access.

At the same time, it should be noted that the introduction of logistics innovations into the management system of many domestic enterprises is in itself a new form of innovative activity. At the initial stage of implementing logistical innovations, an enterprise needs to define its goals and determine which logistical processes should be reorganised, supplemented or, conversely, eliminated in order to achieve these goals. Particular attention should be paid to areas such as commercial services, accounting systems, procurement and supply.

At the same time, it is important to take into account typical problems that often arise in logistics activities:

- the lack of a clear system of information exchange between transport and warehouse services, which leads to delays in loading, unloading and transport downtime;

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[29] *Kustrich, L. O. (2023). Innovations in the field of logistics management. State and Regions. Economics and Entrepreneurship, 3(129). https://surl.li/xbgewr*

[30] *Kravchuk, I. I., Bezditko, O. Ye., & Zhelieznikov, O. M. (2024). Communication management of logistics support of distribution networks in agribusiness. Efektyvna ekonomika, (10). https://doi.org/10.32702/2307-2105.2024.10.17*

- incorrect data in accounting systems regarding the range and quantity of goods in stock, often due to careless inventory taking;
- lack of a system for accounting for and tracking defective products;
- shortage of qualified workers;
- inability to organise parallel work in several warehouses due to a lack of personnel or necessary equipment;
- shortcomings in goods loading and unloading schedules;
- formal definition of freight forwarders' responsibility for cargo;
- weak internal logistics interaction between departments focused only on their own performance indicators without taking into account overall performance;
- lack of clear rules for determining delivery costs based on routes and criteria; shortcomings in the information system, due to which the movement of goods is sometimes reflected only in virtual space, without reflecting real commodity values.[31]

In general, innovations in logistics should include the following components (Fig.2.3.2).

Taking into account the components of innovative logistics activities, we can identify key factors that influence the effectiveness of logistics processes: the time required to complete logistics operations; improving the quality of services; reducing logistics costs.

The implementation of logistics innovations allows small businesses to achieve comprehensive improvement in their activities. Thanks to the use of modern digital solutions and innovative approaches, procurement, production, and sales

[31] *Bezditko, O. Ye., Zelinska, A. M., & Budnik, O. M. (2025). Features of risk management of logistics systems under global risks. Business Navigator, 2(79), 449–453. https://doi.org/10.32782/business-navigator.79-73*

processes are optimised, which ensures increased speed, accuracy, and efficiency of inventory management. One of the key results is a reduction in logistics and transportation costs, which has a positive impact on the overall cost of production and its competitiveness in the market. In addition, logistics innovations contribute to a more flexible and responsive response of the enterprise to changes in market conditions, fluctuations in demand or crisis situations, ensuring the stability and adaptability of the logistics system.

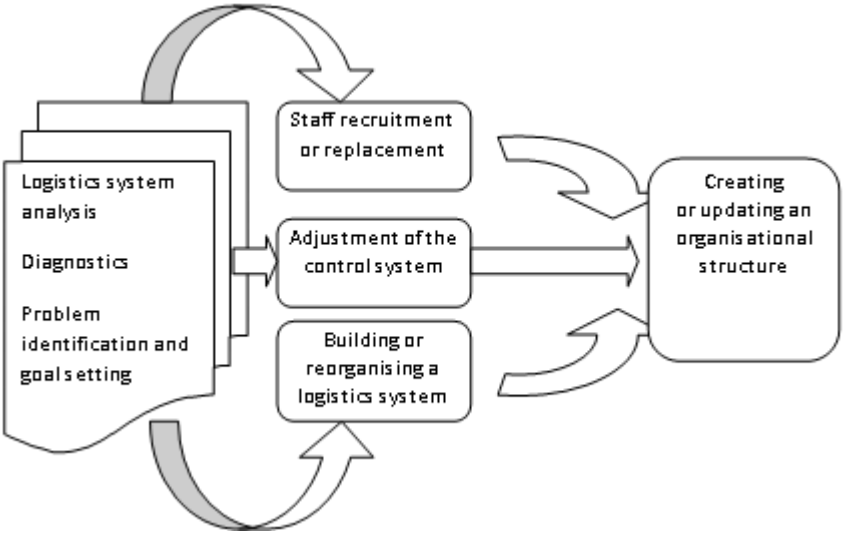

Figure 2.3.2. Components of innovation logistics

An innovative approach to logistics development for small businesses – digital integrated logistics involves a comprehensive digital transformation of key logistics processes. The model is based on digital inventory management using WMS (warehouse management system) and ERP (enterprise resource planning) technologies, which enable accurate tracking and forecasting of inventory. An important element is GPS and IoT transport

monitoring, which provides real-time control of cargo movements and allows for the optimisation of delivery routes. The use of analytics, artificial intelligence and Big Data technologies enables demand forecasting, demand planning and cost reduction.[32;33]

The automation of warehouses and transport processes – using robotic systems, drones, and automated sorting solutions – significantly speeds up operations and reduces the likelihood of errors. An equally important component is the integration of the enterprise with customers and suppliers through CRM systems and online platforms, which ensures process transparency, speeds up order processing and improves service quality. The final part of the model is the implementation of modern cyber security measures to maintain confidentiality and secure information exchange in the supply chain.

The expected results from implementing this model include a reduction in logistics costs by an average of 15–25 %, an increase in inventory management accuracy to 95 %, a significant reduction in order processing time, and a significant improvement in customer satisfaction. At the same time, the company increases its adaptability and resilience to crises and market fluctuations, ensuring its long-term efficiency and competitiveness.

For small businesses, which traditionally have limited resources, the implementation of innovative logistics solutions opens up the opportunity to compete on an equal footing with larger companies. Technology allows for better control of goods

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[32] *Bezditko, O. Ye., Zelinska, A. M., & Budnik, O. M. (2025). Features of risk management of logistics systems under global risks. Business Navigator, 2(79), 449–453. https://doi.org/10.32782/business-navigator.79-73*

[33] *Kravchuk, I. I., Bezditko, O. Ye., & Zhelieznikov, O. M. (2024). Communication management of logistics support of distribution networks in agribusiness. Efektyvna ekonomika, (10). https://doi.org/10.32702/2307-2105.2024.10.17*

flows, faster response to fluctuations in demand, reduction of unsold inventory, and stability of supply. This directly increases the competitiveness of small businesses, as optimised logistics processes contribute to increased profitability and the efficient use of financial and material resources.

In fact, logistical innovations not only modernise internal processes, but also become a strategic basis for strengthening the position of small businesses in the market, ensuring their flexibility, sustainability and ability to adapt quickly.

Thus, the economic, social and political challenges of recent years have highlighted the need to reform small business activities, in particular based on the principle of innovation and active digitalisation of business processes. It is digital transformation that is now becoming a key factor in ensuring the rapid recovery and sustainability of any country's economy. The introduction of digital technologies in small enterprises creates added value for customers: access to necessary data is simplified, and the quality of information exchange between consumers, staff and suppliers is improved.

This, in turn, minimises transaction costs, reduces transaction time and increases sales and service provision. The level of digitalisation of a small business directly determines its ability to adapt to economic or social crises. Therefore, companies that actively implement digital solutions demonstrate greater flexibility and responsiveness to external threats, and digital transformation serves not only as a tool for increasing competitiveness, but also as a means of ensuring the stability and viability of small businesses in conditions of instability.

CHAPTER 3

MARKETING IN THE SYSTEM OF STRATEGIC DEVELOPMENT OF SMALL BUSINESS

МАРКЕТИНГ У СИСТЕМІ СТРАТЕГІЧНОГО РОЗВИТКУ МАЛОГО БІЗНЕСУ

The role of marketing in the strategic management of small business development in the context of increasing competitive pressure and digitalisation of the economy is investigated. The essence and features of small business marketing strategies are revealed, taking into account limited resources, management flexibility and customer orientation. The importance of personalised marketing and social media as tools for improving the effectiveness of interaction with consumers and increasing market share is substantiated. Integrated marketing communications and multi-channel approaches are analysed as the basis for forming a consistent brand message and improving the effectiveness of marketing activities. Considerable attention is paid to branding and customer loyalty management as strategic factors for the long-term development of small businesses. It is concluded that the comprehensive use of marketing strategies, digital tools and branding solutions ensures the strengthening of competitive positions and the sustainable development of small enterprises.

Досліджено роль маркетингу в системі стратегічного управління розвитком малого бізнесу в умовах посилення конкурентного тиску та цифровізації економіки. Розкрито сутність і особливості маркетингових стратегій малого бізнесу з урахуванням обмеженості ресурсів, гнучкості управління та орієнтації на клієнта. Обґрунтовано значення персоналізованого маркетингу та соціальних медіа як інструментів підвищення ефективності взаємодії зі споживачами та зростання ринкової частки. Проаналізовано інтегровані маркетингові комунікації та мультиканальні підходи як основу формування узгодженого брендового повідомлення і підвищення результативності маркетингової діяльності. Значну увагу приділено брендингу та управлінню лояльністю клієнтів як стратегічним чинникам довгострокового розвитку малого бізнесу. Узагальнено, що комплексне використання маркетингових стратегій, цифрових інструментів і брендингових рішень забезпечує зміцнення конкурентних позицій та стійкий розвиток малих підприємств.

3.1. Marketing strategies of small businesses in a turbulent market environment

In today's competitive environment, marketing plays a decisive role in ensuring the sustainable development of small businesses. It is not only a means of effectively promoting goods and services, but also a tool for understanding customer needs, adapting offerings to market changes, and establishing long-term relationships with target audiences. Contemporary approaches, such as personalized marketing and the active use of social media, open up new opportunities for small enterprises. These approaches facilitate customer acquisition, enhance customer loyalty, and gradually increase market share.

Personalized marketing is an approach to promotion that utilizes data on customer behavior, preferences, demographic characteristics, and other personal attributes in order to create unique and relevant offers for each individual customer or customer segment. This approach enables companies to gain a deeper understanding of their consumers, increase engagement, and satisfy customer needs at a more profound level.[34;35]

Small business marketing can be defined as a set of strategies and tools aimed at promoting goods and services while taking into account limited resources. Marketing enables small enterprises to attract customers, differentiate themselves in the market, and grow even under conditions of intense competition. Personalized marketing influences customers by delivering more relevant content aligned with their interests and needs, significantly enhancing satisfaction with brand interactions,

[34] *Personalized customer experience. (2024). In Using AI in marketing (pp. 41–48). https://doi.org/10.1515/9781501519765-009*

[35] *Personalized marketing. (2012). In CIM revision cards: Marketing in practice (pp. 77–78). https://doi.org/10.4324/9780080546629-38*

improving the customer experience, and increasing brand loyalty.[36;37]

The main marketing challenges faced by small businesses include limited budgets, time constraints, staff shortages, limited marketing expertise, and competition with larger companies. At the same time, small businesses possess several advantages, such as flexibility (the ability to rapidly adjust strategies), personalization (closer relationships with customers through direct communication), and local advantages (the ability to focus on local audiences). Personalized approaches foster a sense of care and attention among customers, helping to establish emotional connections with the brand and often leading to long-term relationships.

Key personalized marketing strategies for small businesses include targeted marketing (clearly defining the target audience), segmentation based on age, location, interests, and other criteria, content personalization, adaptation of messages to the needs of each customer segment, and local marketing focused on nearby customers through the use of geotargeting to increase conversion rates. Marketing channels for small businesses include social media platforms such as Facebook, Instagram, and LinkedIn for customer engagement and advertising; email marketing for distributing offers and informational materials to maintain customer relationships; websites that are simple and informative with search engine optimization (SEO) to enhance visibility; and pay-per-click (PPC) advertising, including Google Ads and social media advertising, for rapid traffic acquisition.

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[36] *Bahorka, M. O., & Ustik, T. V. (2022). Substantiation of the choice of a marketing strategy for enterprise management. Problems of Modern Transformations. Series: Economics and Management, (5). https://doi.org/10.54929/2786-5738-2022-5-04-01*

[37] *Shevchuk, P., & Derhaliuk, B. (2022). Formation of marketing policy in modern entrepreneurship. Economy and Society, (42). http://surl.li/qgvbdi*

Offers that align with the needs of specific customers significantly increase the likelihood of purchase. Through personalization, companies can provide products or services that customers require at a particular moment. By optimizing advertising and reducing costs, enterprises avoid allocating resources to irrelevant audiences and instead focus on consumers who are more likely to make a purchase. This increases the effectiveness of marketing campaigns, reduces expenditures, and enhances customer satisfaction and word-of-mouth recommendations.[38;39]

The challenges of personalized marketing include issues of data privacy and security, as customers may have concerns regarding the collection and use of personal data, potentially reducing trust in the brand. Another challenge is the complexity of implementation, particularly the lack of algorithms and tools for processing large volumes of data and accurately predicting consumer behavior. Therefore, personalized marketing for small enterprises is an effective instrument for fostering customer loyalty, increasing sales, and optimizing costs. However, its successful implementation requires careful consideration of ethical and technical aspects in order to create a positive customer experience and build trust-based relationships.

The main principles of using social media to promote products and build effective marketing strategies include identifying the target audience to focus efforts on appropriate platforms and tailor content accordingly; creating high-quality content, including professional images, videos, and creative text to capture and retain user attention; and maintaining consistency

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[38] Romanchukevych, M. Y., & Biletska, I. M. (2021). Features of using modern marketing tools in crisis conditions. Efficient Economy, (8). http://surl.li/rcuptt

[39] Semenova, L. Y., Datsenko, V. V., & Khurdei, V. D. (2020). Marketing 4.0. Efficient Economy, (11). https://surl.lu/cnqzkg

and regularity in posting to ensure sustained brand visibility. Key marketing tools for small businesses include Canva for creating visual materials, Mailchimp for email campaigns, Google My Business for improving search visibility, and Buffer or Hootsuite for scheduling social media posts.[40]

The use of stories and video content – such as live streams and short-form videos including Reels or TikTok – typically generates high engagement levels. These formats can be utilized to showcase behind-the-scenes activities, product demonstrations, and real-time interaction with followers. A distinctive feature of marketing budgeting in small enterprises is the allocation of funds across multiple channels (social media, advertising, email marketing, etc.), with an emphasis on cost-effective and low-budget tools, as well as the use of free or inexpensive resources that promote interactivity and audience engagement. Collaboration with influencers and partners can help expand product reach. Marketing analytics and optimization involve evaluating key performance metrics, such as customer engagement, conversion rates, sales, and return on investment (ROI). Core analytical tools include Google Analytics, Facebook Insights, and email performance statistics, which provide insights into current trends.[41;42]

Timely adaptation to changes – through rapid responses to emerging formats, memes, or popular topics – can increase

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[40] Tataryntseva, Y. L., Pushkar, O. I., Druhova, O. S., & Makarenko, A. B. (2022). Management of digital marketing monetization processes in the context of ensuring enterprise financial development. Marketing and Digital Technologies, 6(1), 32–44. https://mdt-opu.com.ua/index.php/mdt/article/view/166/148

[41] Skryhun, N. P., Rozumei, S. B., & Molin, N. O. (2022). Online and offline tools in the system of integrated marketing communications. Marketing and Digital Technologies, 6(2), 49–61. https://surl.li/oflcpb

[42] Nishikawa, H. (2021). Digital marketing. Japan Marketing Journal, 41(2), 3–6. https://doi.org/10.7222/marketing.2021.040

content relevance and visibility. Encouraging user-generated content by motivating customers to share their own photos and videos featuring products creates social proof and can significantly enhance the trust of potential customers.

Key factors contributing to the promotion of small business products on social media include the use of special offers and promotional codes available exclusively to social media followers, which enhances brand loyalty and stimulates repeat purchases. Regular social media presence, active feedback mechanisms, the use of customer reviews and recommendations, competitor analysis, and the adaptation of successful practices ensure continuous evaluation and refinement of marketing strategies.

3.2. Integrated marketing communications of small businesses in digital and omnichannel ecosystems

Integrated Marketing Communications (IMC) constitute an essential component of a successful marketing strategy for small businesses. IMC involves the coordinated use of various communication channels and tools to reach target audiences and deliver a coherent and consistent marketing message. The application of IMC enables small enterprises to interact effectively with consumers, enhance brand awareness, and stimulate sales growth.[43;44] Multichannel communication represents a key aspect of IMC, as it allows businesses to reach target audiences through diverse platforms, including social media, email, mobile

[43]*Kotler, P., & Keller, K. L. (2014). Marketing management (14th ed.). Pearson.*

[44]*Stanislavyk, O. V., & Kovalenko, O. M. (2022). Marketing as a component of enterprise innovative activity. Economics, Finance, Law, (9), 24–27.*

applications, websites, blogs, as well as traditional media such as television and radio.[45]

The use of social media platforms such as Facebook, Instagram, Twitter, and LinkedIn enables small businesses to engage with their audiences in real time, create content, receive feedback, and build customer loyalty. Social media also provides opportunities for targeted advertising, allowing enterprises to reach potential customers efficiently.[46]

Email marketing is an effective tool for maintaining communication with customers through the distribution of newsletters, special offers, and company updates. Email serves as a powerful instrument for sustaining relationships with existing customers and informing them about new products and significant events. Well-designed email campaigns can increase conversion rates and support customer retention.[47]

Mobile applications and SMS messaging can be employed for direct communication with customers, particularly to provide information on discounts, promotional campaigns, and new product offerings. These channels ensure a high level of customer engagement. Mobile applications facilitate interaction through mobile devices by providing convenient access to products and services. Video marketing, using platforms such as YouTube, supports the creation and dissemination of video content that enhances engagement and brand recognition.

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[45]*Yanchuk, T., & Boienko, O. (2023). Implementation of CRM systems as a means of increasing the effectiveness of marketing activities. Economy and Society, (48). http://surl.li/wcdqgc*

[46]*Tataryntseva, Y. L., Pushkar, O. I., Druhova, O. S., & Makarenko, A. B. (2022). Management of digital marketing monetization processes in the context of ensuring enterprise financial development. Marketing and Digital Technologies, 6(1), 32–44. https://surl.li/ehpweu*

[47]*Skryhun, N. P., Rozumei, S. B., & Molin, N. O. (2022). Online and offline tools in the system of integrated marketing communications. Marketing and Digital Technologies, 6(2), 49–61. https://surl.li/mrszqx*

Websites and blogs also play a critical role in multichannel communication. A corporate website serves as a primary tool for providing information about products and services and for enabling e-commerce activities. Search Engine Optimization (SEO) involves optimizing website content and structure to improve visibility in search engine results, thereby attracting organic traffic. Content marketing focuses on the creation and distribution of valuable content (articles, blogs, videos) designed to attract and retain target audiences. Paid advertising, such as Google Ads, enables rapid access to target audiences through search engines and social media platforms. Analytical tools, including Google Analytics, allow businesses to track user behavior, evaluate the effectiveness of marketing campaigns, and make data-driven decisions.[48;49]

Customer Relationship Management (CRM) systems support the management of customer interactions by improving service quality, monitoring communication history, and increasing sales performance.[50] The application of these digital tools enables small businesses to effectively reach their target audiences, enhance conversion rates, and maintain competitiveness.[51]

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[48] Banshchykov, P., Pazdrii, V., & Vashchenko, I. (2018). Opportunities for the use of Internet technologies in companies' marketing activities. Accounting and Auditing, (6), 20–31.

[49] Abuselidze G., Tarasovych L., Yaremova M., Usiuk T., Lavrynenko S., Slobodianyk A.(2025). Imperatives of Social Marketing in the Context of Rural Entrepreneurship. Sustainable Development and Green Innovation Managing Risk Through Interdisciplinary Approaches and Policy Strategies, 2025, PP. 127–146. https://doi.org/10.1108/978-1-83608-462-420251006.

[50] Yanchuk, T., & Boienko, O. (2023). Implementation of CRM systems as a means of increasing the effectiveness of marketing activities. Economy and Society, (48). http://surl.li/wcdqgc

[51] Bespalov, V., Gubernyk, A., & Obniavko, O. (2021). Marketing audit as a tool for assessing the marketing potential of an enterprise. Economist, (9), 68–69.

Digital tools in the marketing activities of small businesses offer extensive opportunities for customer acquisition, brand awareness enhancement, and sales growth, as well as a range of specific advantages, including:

- *Measurability and analytics:* digital marketing tools enable precise measurement of campaign performance, analysis of user behavior data, and the derivation of insights for strategic improvement. Analytical platforms such as Google Analytics allow businesses to monitor website traffic, traffic sources, and conversion rates.
- *Targeting and personalization:* digital tools facilitate the development of targeted advertising campaigns aimed at specific audience segments. Personalized content and promotional messages increase user engagement and conversion likelihood.
- *Cost efficiency*: digital marketing channels, including social media, email marketing, and content marketing, are often more cost-effective than traditional media, allowing small businesses to allocate budgets efficiently and achieve higher returns on investment.
- *Broad reach:* digital tools enable small enterprises to reach global audiences, enter new markets, and expand their customer bases.
- *Rapid adaptation and flexibility:* digital technologies allow businesses to respond quickly to market changes and shifting consumer preferences, adjust marketing strategies, and react promptly to customer feedback.[52;53;54]

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[52] Buha, N., & Pelekhatskyi, D. (2022). Prospects for the use of innovative technologies in enterprise marketing activities. Economy and Society, (42). http://surl.li/mfrome

[53] Bespalov, V., Gubernyk, A., & Obniavko, O. (2021). Marketing audit as a tool for assessing the marketing potential of an enterprise. Economist, (9), 68–69.

Thus, the application of multichannel communication and digital marketing tools enables small businesses to interact effectively with target audiences, enhance customer loyalty, and increase sales performance. This contributes to sustainable development and improved competitiveness in the marketplace.

3.3. Branding and customer loyalty management as drivers of sustainable competitive advantages of small businesses

Branding creates a unique identity for a company or product that differentiates it from competitors and fosters an emotional connection with customers. Clear and consistent brand communication strengthens consumer trust, as individuals tend to trust what is predictable and recognizable. A positive brand experience increases the likelihood of repeat purchases and recommendations, which are key elements of customer loyalty. Corporate social responsibility and brand authenticity further enhance emotional engagement by enabling customers to feel aligned with shared values. Building loyalty through branding increases customer lifetime value, thereby ensuring sustainable long-term business growth.[55]

Branding is a strategic process of creating, developing, and managing a brand in order to establish a distinctive corporate image in the market, enhance brand recognition, attract consumer attention, and generate significant competitive

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[54] *Lee, G. H., et al. (2024). Developing personalized marketing service using generative AI. IEEE Access, 1–15. https://surl.li/fvzdrb*

[55] *Tanasiychuk, A. M., Sirenko, S. O., & Pnevskyi, V. V. (2020). Formation of a brand promotion strategy using digital marketing tools. Eastern Europe: Economy, Business and Management, (24), 161–167. http://surl.li/fzrtvs*

advantages.[56] A brand is not merely a logo or a company name; it represents a set of perceptions and experiences associated with a product, service, and organization. In developing a brand, a company defines its identity, values, style, and modes of communication with customers.[57]

To create an effective branding strategy for small businesses, it is essential to begin with clear brand identification. This involves understanding brand values, mission, and unique value proposition that differentiates the brand from competitors. The next step is to analyze the target audience – both existing and potential customers – along with their needs and expectations. Gaining a comprehensive understanding of the target audience requires thorough market research, including data collection from reliable sources, surveys, interviews, and experiments. Based on the collected data, trends and behavioral patterns are identified, and insights into customer preferences are formed. Attention should also be given to social media platforms, which provide real-time feedback and valuable market intelligence.[58]

When shaping a brand, particular emphasis should be placed on precise brand positioning, which clearly distinguishes the brand from competitors. Following an in-depth understanding of the target audience, a comprehensive brand promotion system

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[56] *Tarasovych, L. (2019). Marketing and branding of rural territorial communities. In T. Zinchuk & J. Ramanauskas (Eds.), Sustainable development of rural areas (pp. 110–119). Klaipėda University Press.*

[57] *Tarasovych, L. (2025). Territorial brand marketing in Ukraine 3.0: Trends, strategic imperatives, and European dimensions. In EU cohesion policy: Reality, challenges, and prospects (Proceedings of the International Scientific and Practical Conference, Zhytomyr, May 9, 2025) (pp. 73–81). Polissia National University.*

[58] *Stepanenko, N. I., & Volkova, I. M. (2023). Cross-cultural communications in the formation of a corporate brand. Economy and Society, (56). https://doi.org/10.32782/2524-0072/2023-56-97*

should be developed, including the strategic use of visual elements and appropriate marketing channels.[59]

Effective branding is fundamentally about creating emotional connections. Therefore, it is advisable to develop a compelling brand story that clearly presents the brand in an accessible manner, highlights the challenges that led to its creation, articulates its core values and mission, emphasizes differentiation from competitors, and underscores the positive impact on customers» lives. Based on this narrative, a unique value proposition should be formulated, clearly distinguishing the offered products and services from available alternatives. This process ensures that the brand remains relevant and resonates with its audience.[60]

To build brand trust in small businesses, it is crucial to establish a strong and lasting online presence. This includes developing a user-friendly website and actively utilizing social media channels for regular customer engagement. Content marketing serves as a powerful tool for building brand authority, attracting new customers, and retaining existing ones. Providing valuable and informative content through media outlets, blog posts, articles, and videos not only facilitates interaction with the audience but also fosters the development of loyal followers.

An effective trust-building instrument is the development of relationships with brand ambassadors. When collaborating with influencers, it is important to select individuals who have substantial followings and align with the brand»s values and target audience. These opinion leaders can endorse products or

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[59] Yanchuk, T. V. (2023). Application of Internet marketing technologies in enterprise sales activities. Problems of Innovation and Investment Development, (30), 98–106.

[60] Tanasiychuk, A. M., Sirenko, S. O., & Pnevskyi, V. V. (2020). Formation of a brand promotion strategy using digital marketing tools. Eastern Europe: Economy, Business and Management, (24), 161–167. http://surl.li/fzrtvs

services, increase brand awareness, and attract potential customers. Their credibility and authority significantly influence brand perception, purchasing decisions, and sales stimulation.

Thus, adapting small businesses to the modern and dynamic market environment through the creation of strong and recognizable brands is essential for long-term success.[61]

Customer loyalty is a critical component of marketing strategy, as retaining and satisfying existing customers is often less costly than acquiring new ones. Increased customer loyalty raises the likelihood of repeat purchases and continued engagement. It is important to develop exclusive, continuous, and long-term customer commitment to a company»s offerings through the effective integration of shared values, ensuring balance between product markets and social responsibility. Consequently, when designing customer loyalty management mechanisms, it is essential to consider trends and changes in both internal and external environments.

The development of customer loyalty programs is aimed at improving customer retention and enabling control over purchasing behavior, communication channels, and interaction frequency across online and offline touchpoints. Loyalty programs seek to identify loyal and potentially loyal customers and engage them through attractive and meaningful rewards. Customer loyalty management can be regarded as a unified, cross-sectoral solution for managing market participants. Typically, loyalty programs are multi-layered and multi-channel, which complicates their implementation and control. However, the most effective programs are those that can be efficiently managed in both the

[61] *Tarasovych, L. (2025). Regional marketing: European insights for Ukraine. In O. H. Bului et al., & N. M. Kutsmus (Ed.), Inclusive rural development: Integration, responsibility, democracy (pp. 155–170). SBA Print; Interscience Publishing House. https://doi.org/10.25313/978-617-7594-07-8*

short and long term while accounting for dynamic market conditions and consumer behavior.[62]

Managing the enterprise – customer relationship system is a key aspect of strategic business management. This process encompasses a wide range of activities and strategies aimed at attracting, retaining, and developing the customer base. Acquiring new customers often requires substantial marketing and advertising expenditures. In contrast, retaining loyal customers reduces the need for intensive promotional campaigns, as existing customers are already familiar with the brand and its offerings. Satisfied repeat customers are more likely to recommend the brand to acquaintances and colleagues, thereby generating additional customers without significant marketing costs. Personalization of offers is also an effective measure for enhancing customer loyalty, as it increases the probability of customer retention.

At the same time, attracting new customers remains essential for business growth. Acquiring new customers helps expand the audience and creates additional opportunities for profitable growth. The optimal balance between customer retention and acquisition depends on the strategic objectives of a particular business.

Customer loyalty formation is strategically important, as it enables enterprises to establish and maintain a strong brand position in the minds of target audiences. This process allows businesses to better understand how customers perceive marketing tools and how improved results can be achieved. In this context, customer satisfaction monitoring is based on the effectiveness of collecting, processing, and evaluating data related to customer loyalty.

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[62]*Sobolieva-Tereshchenko, O. A., & Antonova, V. O. (2019). Evaluation of marketing activity effectiveness in the context of developing customer loyalty programs. Efficient Economy, (5). https://surl.li/sxoquf*

In conclusion, it is essential for small businesses to remain flexible and open to experimentation, testing innovative marketing methods, and adopting new platforms for attracting and nurturing loyal audiences. This proactive approach enables businesses to stay ahead of competitors and continuously improve. Monitoring market trends and analyzing key performance indicators allow small business owners to retain existing customers and attract new ones within the current business landscape. Customer loyalty thus becomes a critical success factor, significantly enhancing brand recognition and overall competitiveness.

CHAPTER 4

LOGISTICS MANAGEMENT IN SMALL BUSINESS DEVELOPMENT

ЛОГІСТИЧНИЙ МЕНЕДЖМЕНТ У РОЗВИТКУ МАЛОГО БІЗНЕСУ

The theoretical and applied foundations of logistics management as a factor in the development and competitiveness of small businesses are examined. The role of logistics in forming sustainable competitive advantages through the optimisation of flow processes, cost reduction, and improved customer service quality is substantiated. The peculiarities of supply chain management in small enterprises are analysed, taking into account resource constraints, digitalisation and the growth of external risks. The essence and structure of logistics costs are revealed, as well as their impact on the financial condition and performance of small enterprises. The expediency of using logistics outsourcing in small businesses as a way to minimise risks and concentrate resources on key activities is substantiated. It is summarised that effective logistics management and adaptive logistics strategies are important factors for the sustainable development and strengthening of the market positions of small businesses in Ukraine.

Досліджено теоретичні та прикладні засади логістичного менеджменту як чинника розвитку та підвищення конкурентоспроможності малого бізнесу. Обґрунтовано роль логістики у формуванні стійких конкурентних переваг через оптимізацію потокових процесів, зниження витрат і підвищення якості обслуговування споживачів. Проаналізовано особливості управління ланцюгами постачання малих підприємств із урахуванням ресурсних обмежень, цифровізації та зростання ризиків зовнішнього середовища. Розкрито сутність і структуру логістичних витрат, а також їх вплив на фінансовий стан і результативність діяльності малого підприємства. Обґрунтовано доцільність застосування логістичного аутсорсингу в малому бізнесі як способу мінімізації ризиків і концентрації ресурсів на ключових видах діяльності. Узагальнено, що ефективний логістичний менеджмент і адаптивні логістичні стратегії є важливими чинниками сталого розвитку та зміцнення ринкових позицій малого бізнесу в Україні.

4.1. The role of logistics in ensuring the competitiveness of small businesses

Logistics plays a key role in ensuring the competitiveness of small businesses, as it allows for effective supply management, reducing transportation, storage and inventory management costs. Optimised logistics processes enable a rapid response to changes in demand, which is particularly important for small businesses that often operate in a dynamic market environment. The use of modern logistics technologies, such as CRM or automated supply chain management systems, improves customer service quality and increases customer loyalty. By outsourcing logistics functions, small businesses can focus on their core activities while improving operational efficiency. As a result, logistics contributes to the creation of additional competitive advantages, strengthening the position of small businesses in the market.[63]

In today's business environment, effective management of logistics processes is a key factor in the success of enterprises. Logistics is an important component of the supply chain and is responsible for the optimal planning, coordination and control of the movement of goods, information and funds from suppliers to end consumers. The functioning of modern logistics systems in Ukraine requires domestic enterprises to achieve maximum efficiency in logistics activities in order to increase their competitive advantages in the market. Logistics systems must develop effective operating strategies that integrate all aspects of their activities, taking into account the impact of external and internal factors, as well as potential risks.

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[63] *Yanchuk, T., & Boienko, O. (2023). Implementation of CRM systems as a means of increasing the effectiveness of marketing activities. Economy and Society, (48). http://surl.li/wcdqgc*

Optimising logistics processes allows you to increase the speed, quality and efficiency of the supply of goods and services, reduce costs, increase customer satisfaction and ensure competitive advantages in the market. The problem is that a significant number of companies do not understand the full potential of optimising logistics processes and do not use modern methods and approaches to logistics management. This can lead to failure to achieve maximum results in the supply of goods and services, loss of competitiveness and dissatisfaction of customer needs.[64]

Performance evaluation is one of the main areas of logistics analysis. The efficiency of a logistics system is a comparison of logistics costs and the results of logistics activities, taking into account all functional areas, all stages of the logistics cycle, and the entire supply chain. Efficiency is the basis for establishing quantitative criteria for the rationality of management decisions. It includes functional, material, structural, and systemic characteristics of the logistics system's activities. By analysing the effectiveness of the logistics system's activities, it is possible to evaluate the parameters of their activities, such as the integrity, dynamism, and interconnection of the links in the logistics chain.[65;66]

The impact of logistics processes on operational efficiency through optimisation is an important stage in supply chain

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[64] *Lavrynenko, S., Zelinska, A., Tarasovych, L., & Bilych, V. (2025). Digitalization and transparency: Innovative activity in logistics management. Sustainable Development of the Economy, 3(54), 58–63. https://doi.org/10.32782/2308-1988/2025-54-9*

[65] *Bezditko, O. Ye., Zelinska, A. M., & Budnik, O. M. (2025). Features of risk management of logistics systems under global risks. Business Navigator, 2(79), 449–453. https://doi.org/10.32782/business-navigator.79-73*

[66] *Yanchuk, T. V. (2023). Application of Internet marketing technologies in enterprise sales activities. Problems of Innovation and Investment Development, (30), 98–106.*

management, as it aims to achieve maximum efficiency and optimal use of resources. The impact of logistics process optimisation on business efficiency can be significant, improving various indicators such as delivery speed, logistics costs, customer service levels and many others. Optimising logistics processes involves analysing and improving various stages of the supply chain, including raw material procurement, production, storage, transportation, and delivery of goods to end consumers. This process requires careful planning, coordination, and cooperation between all participants in the supply chain to ensure optimal service levels and minimise costs.[67]

The strategies of many logistics systems need to shift from focusing on overall economic impact to a targeted innovation strategy using a logistics approach. In virtually all sectors of the economy, there is a correlation between competitive positions, innovation potential and the efficiency of logistics systems. The efficiency of logistics systems can be improved by reducing costs, improving product quality, applying innovations, producing new competitive products and providing a high level of service.

A logistics strategy for small businesses ensures the formation of a company's logistics policy aimed at planning and managing internal and external flow processes based on their integration and coordination in order to gain a competitive advantage. It forms links between corporate strategy and individual logistics functions, which are implemented in the enterprise's logistics system and beyond. Logistics strategy is an integral part of the enterprise's overall strategy and is a long-term programme of specific actions to ensure production and

[67] *Lavrynenko, S., Tarasovych, L., & Zelinska, A. (2025). Social entrepreneurship as an innovative component of post-war business. Efektyvna ekonomika, (4). https://doi.org/10.32702/2307-2105.2025.4.52*

economic activities aimed at manufacturing and selling products.[68]

The formation of a logistics strategy follows certain principles, namely: the coordination of information, resource, technical and other characteristics of the logistics system; to achieve a common goal, the elements of the logistics system are considered to be interrelated and interacting (system approach); to achieve the global goals of the system, the local goals of the functional elements of the logistics system are coordinated (system-wide optimisation); the logistics system must operate stably in the event of permissible deviations in the parameters and factors of the internal and external environment (principle of stability and adaptability).

Competitive advantages related to logistics activities, which are determined by changes in the priorities of value chain formation and, accordingly, new opportunities for logistics support of competitiveness, can play a special role in ensuring the competitiveness of an enterprise in a dynamic market environment. The adaptation of logistics strategies is a key success factor for small businesses in unstable market conditions.

4.2. Supply chain optimisation for small businesses

Supply chain management is an important aspect of any business, including small businesses. The use of digital technologies can significantly improve process efficiency, reduce costs, and adapt to market changes. Modern digital technologies

[68] *Tarasovych, L. V., & Kropyvka, T. Yu. (2025). The impact of artificial intelligence technology on the logistics management system of agro-industrial enterprises under a volatile security environment. Successes and Achievements in Science, (1)(11), 720–730. https://surl.li/ikvizg*

can be used by small businesses to achieve optimal supply chain performance. As is well known, one of the problems characteristic of small businesses is limited resources, which makes automation critically important. In particular, the use of specialised software, such as ERP systems (e.g. Zoho Inventory or Odoo), helps to optimise inventory tracking, generate orders to suppliers and ensure accurate accounting of goods.

Supply chain management can be optimised by ensuring constant access to the necessary information. Cloud platforms allow small businesses to access modern technologies without significant investment in IT infrastructure. For example: inventory management systems (TradeGecko, Fishbowl) provide real-time access to data from anywhere. Collaboration platforms (Google Workspace, Microsoft Teams) help coordinate work with suppliers.[69]

One of the modern tools that allows you to optimise supply chain management is the Internet of Things. It allows small businesses to track the movement of goods in real time using sensors, collect data on storage conditions (temperature, humidity), and increase the transparency of supply chains.

E-commerce platforms (Shopify, WooCommerce) can be integrated with SCM systems to synchronise sales and inventory and automatically update product availability information.[70]

Digital payment systems simplify financial transactions with suppliers, minimising payment processing time and ensuring

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[69] *Prysiazhniuk, O. F., Kravchuk, I. I., & Misevych, M. A. (2024). Modern trends in digitalization of business management. Problems of Modern Transformations: Economics and Management Series, (1)(10). https://doi.org/10.54929/2786-5738-2024-12-04-03*

[70] *Lavrynenko, S., Zelinska, A., Tarasovych, L., & Bilych, V. (2025). Digitalization and transparency: Innovative activity in logistics management. Sustainable Development of the Economy, 3(54), 58–63. https://doi.org/10.32782/2308-1988/2025-54-9*

transparency of financial transactions. Mobile applications for inventory and order management allow small business owners to control operations in progress and respond quickly to changes.[71]

Therefore, the main advantages of using digital technologies for small businesses are cost savings (automation reduces the need for manual labour), flexibility (rapid response to changes in demand or supply), transparency (access to real-time data), competitiveness (the use of modern technologies allows small businesses to compete with larger players). The introduction of digital technologies into supply chains is a strategic step that will help small businesses develop, improve service and ensure growth in profitability.

Effective cooperation with suppliers and optimisation of procurement are key aspects that help small businesses reduce costs, ensure stability of supply and increase competitiveness. Relationships with suppliers are built on trust, quality and mutually beneficial terms. The main criteria for choosing a supplier in small businesses are: product quality: guarantee of compliance with standards, competitive prices that correspond to market conditions, the ability to adjust delivery volumes and terms, feedback from other customers, length of time in the market, logistics capabilities: speed and reliability of delivery.[72]

Effective cooperation with suppliers begins with transparent negotiations. The basis for building partnerships is understanding the supplier's needs and offering mutually beneficial solutions, clearly agreeing on terms and conditions, and setting out all the details in the contract (terms, penalties, guarantees). A

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[71] *Misevych, M., Bessmertnyi, A., Hrybushyn, B., & Kucher, O. (2024). Features of strategic development of logistics enterprises in Ukraine (the case of Nova Poshta LLC). Agrosvit, (14), 69–75. https://surl.li/atfzlk*

[72] *Misevych, M. A., Prysiazhniuk, O. F., Marchuk, D. O., & Marchuk, O. M. (2024). Features of business management based on the use of digital technologies. Agrosvit, (5), 118–122.*

prerequisite for long-term partnerships is discussing discounts for volume or regularity of orders, as well as regular communication, prompt problem solving and information exchange. A discount (markup) may be assigned: to a specific customer in accordance with the terms of sale (in the case of an individual agreement with the customer) or to a group of customers in accordance with the terms of sale (in the case of a standard agreement with customers); based on a specific type of loyalty card presented by the customer; when making sales from a specific warehouse (store).[73]

Both percentage and fixed amount discounts (markups) can be assigned, as well as bonus discounts (gifts, quantity discounts). A quantity discount is applied if the same product is provided as a bonus (gift). A gift is applied in cases where, when purchasing a certain quantity of goods from a particular segment, another product must be provided as a gift. A discount (markup) can be assigned to a specific segment of the nomenclature, to any nomenclature from the list. The percentage and amount of the discount can be specified for each price group.

To increase the effectiveness of «long» sales, the system provides the ability to automate the entire deal management process. It supports all steps of the business process, starting from the moment of agreeing on a commercial offer based on data about the customer's initial interest in the deal, continuing with the formation of a commercial offer, agreement on the cost, payment and delivery schedule, conclusion of a contract, securing the deal with goods, and ending with monitoring the fulfilment of payment and shipment obligations.

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[73] *Kravchuk, I. I., Bezditko, O. Ye., & Zhelieznikov, O. M. (2024). Communication management of logistics support for distribution networks in agribusiness. Efficient Economy, (10). https://doi.org/10.32702/2307-2105.2024.10.17*

In addition, a simplified sales process management mode with manual stage transition has been implemented. Various types of processes with different stages are allowed. For them, the storage of supporting documents is supported – regulations, instructions, document templates and other materials necessary throughout the process lifecycle. All sales processes (transactions) are recorded in the system. They combine all the information accumulated in the system during the preparation and execution of the sale into a single whole: e-mail, call records, meetings, order processing, invoices, delivery notes, additional files, etc. This helps to organise the work of sales managers as conveniently as possible.

Digital solutions can significantly facilitate procurement management. In particular, CRM systems for supply management enable the tracking of cooperation histories, while automated procurement platforms help obtain multiple supplier quotations, monitor order statuses, and analyze and optimize costs.

Procurement planning helps prevent both shortages and excess inventory. In this context, effective approaches such as demand forecasting, sales analysis, and seasonality assessment may be applied. The «Just-in-Time» approach is widely used in small businesses; it involves purchasing goods as needed, thereby reducing storage costs. Order consolidation – i.e., combining orders to reduce logistics expenses – should also be applied where appropriate.

Regular analysis of procurement costs helps identify potential areas for cost savings. In particular, supplier comparison and market monitoring make it possible to identify the most advantageous offers. Reviewing contractual terms and engaging in negotiations can result in discounts or improved delivery conditions. One effective solution in small business procurement management is outsourcing procurement activities, which allows certain processes to be delegated to specialized companies.

Small businesses must take into account supplier-related risks, especially under conditions of martial law, and make effective managerial decisions accordingly. Supplier diversification is one such solution, as it reduces dependence on a single source. Another risk mitigation measure involves establishing relationships with alternative suppliers to ensure continuity in the event of disruptions. Quality control and regular audits of products and processes are essential prerequisites for preventing or mitigating negative impacts.[74]

Modern consumers increasingly value a responsible approach to business. Small enterprises can benefit from environmentally friendly cooperation or from supporting healthy lifestyles. To this end, it is advisable to select suppliers that adhere to the principles of sustainable development. To reduce environmental impact, logistics optimization aimed at minimizing the carbon footprint is also recommended.

Based on the conducted research, the main advantages of optimizing procurement and supplier cooperation include cost reduction achieved through favorable contractual conditions that lower production costs. Quality improvement results from enhanced supplier control and ensures compliance with standards. Business stability is achieved through cooperation with reliable partners who contribute to uninterrupted operational processes. Effective procurement management enhances business flexibility and increases competitiveness. Cooperation with suppliers and procurement optimization are integral components of the successful functioning of small businesses, especially under conditions of dynamic market changes.

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[74] *Tarasovych, L. V., Yurchuk, V. Yu., & Fedorchuk, S. V. (2023). Environmental marketing management as an imperative of socially responsible business. Agrosvit, (2), 42–46. https://doi.org/10.32702/2306-6792.2023.2.42*

4.3. Logistics costs and their Impact on the financial condition of an enterprise

The impact of logistics on costs associated with production, sales, and transportation of goods is evident. Within the logistics approach, such costs include order fulfillment expenses, encompassing order processing, transportation and warehousing of goods, inventory management, packaging, and service activities (including spare parts provision and after-sales service).

It should be noted that logistics costs also include expenses related to the movement and storage of inventory items from the primary source to the final consumer. In addition to actual expenditures, logistics costs of an enterprise should include lost profits resulting from the immobilization of working capital (raw material inventories, work in progress, and finished goods), as well as losses caused by inadequate quality levels of resources and finished products at all stages of the logistics chain—from procurement to product distribution.[75]

Logistics costs constitute a component of the total costs of an enterprise and accompany the movement of material flows, being formed in parallel with them in order to fulfill the primary objective of the logistics system—delivering goods to the right place, in the right quantity, within a specified time frame, and at a predetermined cost level.

Logistics costs are characterized by the following features: distribution across various cost groups classified according to traditional criteria (by type and quantity); a high and often increasing share in the total costs of an enterprise; variability over different time periods; fragmentation of responsibility for their occurrence among numerous organizational units and workplaces

[75] *Bezditko, O. Ye., Zelinska, A. M., & Budnik, O. M. (2025). Features of risk management of logistics systems under global risks. Business Navigator, (2)(79), 449–453. https://doi.org/10.32782/business-navigator.79-73*

that constitute the logistics system; and the labor-intensive nature of determining their total volume, which requires a large number of calculations.

The following types of logistics costs are distinguished:

- Fixed costs, which do not depend on production and sales volumes or the intensity of material flows; these include, for example, warehouse rental expenses;
- Variable costs, which depend on the intensity of material flows controlled by the enterprise, such as raw material procurement and transportation costs;
- Total (gross) costs, defined as the sum of fixed and variable costs;
- Average costs, representing the amount of relevant costs per unit of material flow;
- Marginal costs, defined as the increase in fixed, variable, total, or average costs resulting from an increase in material flow by one unit.

To control logistics costs, the following measures may be proposed:

- ❖ Concentrating efforts on cost control at the points of their occurrence;
- ❖ Processing data on different types of costs in different ways;
- ❖ Reducing activities (procedures, tasks, operations) in order to decrease costs.

The key solution to the problem of reducing logistics costs lies in the consistent and accurate aggregation of all costs incurred during the movement of goods from producer to consumer. Timely and accurate cost data enable sound managerial decision-making and allow for the full implementation of process-oriented management in logistics.

The main ways to reduce the level of logistics costs of an enterprise include:

- Eliminating activities that do not create added value;

- Supporting suppliers and customers in achieving lower cost levels;
- Ensuring control over total costs;
- Searching for lower-cost resources;
- Increasing employee productivity;
- Modernizing the most cost-intensive links of the logistics chain through business investments;
- Improving interaction between the enterprise and its suppliers and customers in the supply process (coordination of activities reduces warehousing, inventory management, storage, and distribution costs);
- Applying advanced operational methods to enhance labor productivity and the efficiency of production and distribution units.[76]

The proposed approaches to reducing logistics costs are indeed effective in improving enterprise performance. Through the analysis of logistics costs, management can strategically plan product distribution, thereby avoiding unnecessary production expenses and maximizing profits.

Thus, logistics costs represent the monetary valuation of resources used in performing various logistics operations at the stages of material, information, and financial flow movement—both within the enterprise and in interaction with suppliers and customers as participants in the supply chain—including order placement, procurement, warehousing, transportation, shipment, and related activities.

At present, logistics outsourcing is one of the key logistics strategies employed by small businesses. Unlike the development of in-house logistics, outsourcing schemes provide high-quality yet standardized services. A significant advantage is the reduction

[76] *Kravchuk, I. I., Lavrynenko, S. O., & Zelinska, A. M. (2023). Digitalization of business processes: An innovative component of enterprise management. Economy and Society, (58). https://doi.org/10.32782/2524-0072/2023-58-19*

of financial risks, as the logistics intermediary assumes responsibility for specific logistics operations. In many cases, outsourcing leads to substantial reductions in logistics costs by lowering transportation expenses, eliminating the need for equipment acquisition, and reducing the maintenance of a large logistics staff.

Moreover, due to intense competition in the logistics services market, logistics companies strive to offer the most commercially attractive proposals in terms of optimal price–quality ratios. Consequently, logistics outsourcing serves as an effective tool for cost optimization and ensuring uninterrupted supply chains.

Logistics outsourcing involves transferring all processes related to storage, movement, and delivery of goods to a third party (a firm or group of companies). Since not every enterprise possesses warehouse facilities and the necessary resources to carry out logistics operations independently, outsourcing often becomes the most appropriate and economically viable cooperation model. This service enables client enterprises to reduce supply-related expenses and personnel costs by transferring responsibility to a professional contractor, allowing them to focus on core activities and avoid non-core operations, thereby increasing overall business efficiency.

In practice, logistics outsourcing entails delegating logistics business processes, including goods receipt and unloading, placement and storage, warehouse accounting, order picking and palletizing, transportation of inventory items, and product labeling.

Entrusting all logistics functions to an external contractor is advisable when an enterprise requires not individual services but the entire logistics chain. This applies to small and medium-sized enterprises that are unable or unwilling to invest in in-house

logistics, as well as large companies with complex, multi-stage supply processes.

Several groups of logistics services can be identified as being in demand in the Ukrainian outsourcing market:

- Transportation and freight forwarding services: transportation services are typically ordered by enterprises that already have an in-house forwarding department, with the transport company responsible only for cargo delivery. However, integrated freight forwarding services, which include full coordination of transportation, are more commonly demanded;
- Warehousing services: establishing warehouse complexes or storage facilities in-house requires significant financial investment in premises acquisition or rental, as well as equipment compliant with regulatory standards;
- Procurement coordination, packaging/repackaging, warehousing, and related services, which are particularly relevant for companies with extensive branch or retail networks;
- Comprehensive logistics services (integrated outsourcing), where a single logistics operator manages the entire supply chain, especially for enterprises with complex, multi-stage logistics algorithms.[77,78]

Therefore, when deciding which logistics functions to delegate to a logistics intermediary, enterprises should consider their internal logistics capabilities, corporate development

[77] *Bezditko, O. Ye., Kravchuk, I. I., & Lavrynenko, S. O. (2024). Strategy for formation and management of logistics supply chains at enterprises. Sustainable Development of the Economy, (2)(49), 252–258. https://doi.org/10.32782/2308-1988/2024-49-402*

[78] *Kravchuk, I. I., Lavrynenko, S. O., & Zelinska, A. M. (2023). Digitalization of business processes: An innovative component of enterprise management. Economy and Society, (58). https://doi.org/10.32782/2524-0072/2023-58-19*

strategy (concentration or diversification), as well as the frequency and complexity of deliveries.

The main advantages of outsourcing for small businesses include:

1) Enabling business owners and management to concentrate resources on core activities while minimizing operational costs through the delegation of secondary functions;
2) Optimizing staff size by reducing auxiliary personnel, thereby decreasing operational costs or converting fixed costs into variable ones, including reductions in taxes and depreciation charges;
3) Reducing financial, operational, and administrative risks through diversification and decentralization, allowing more effective resource allocation and increasing company capitalization;
4) Enhancing company reputation and investment attractiveness, while enabling more flexible pricing and cost management strategies that expand market presence and customer base.

Logistics outsourcing is a highly advantageous form of cooperation, widely used by small businesses. It not only streamlines logistics operations but also optimizes them to achieve maximum benefits with minimal effort.

CHAPTER 5

DEVELOPMENT OF AN INNOVATIVE MODEL OF SMART MANAGEMENT FOR SMALL BUSINESSES

РОЗРОБКА ІННОВАЦІЙНОЇ МОДЕЛІ SMART-МЕНЕДЖМЕНТУ МАЛОГО БІЗНЕСУ

The innovative model of SMART management of small businesses as a holistic architecture of strategic management in the context of digital transformation and growing turbulence in the external environment is substantiated. The role of digital technologies, information and analytical systems, and smart dashboards in supporting adaptive, data-driven management of small enterprises is substantiated. Algorithms for integrating SMART management with SMART industry models, business networks, and SMART specialisation mechanisms are proposed, as well as a methodology for forming a composite SMART management index to assess the level of managerial and digital maturity of small businesses. It is concluded that the proposed model creates a scientifically sound methodological basis for improving the competitiveness, innovative capacity and sustainable development of small enterprises in the long term.

Обґрунтовано інноваційну модель SMART-менеджменту малого бізнесу як цілісну архітектуру стратегічного управління в умовах цифрової трансформації та зростаючої турбулентності зовнішнього середовища. Обґрунтовано роль цифрових технологій, інформаційно-аналітичних систем і смарт-дашбордів у підтримці адаптивного, data-driven управління малими підприємствами. Запропоновано алгоритми інтеграції SMART-менеджменту з моделями SMART-промисловості, бізнес-мережами та механізмами SMART-спеціалізації, а також методику формування композитного індексу SMART-менеджменту для оцінювання рівня управлінської та цифрової зрілості малого бізнесу. Зроблено висновок, що запропонована модель створює науково обґрунтовану методологічну основу для підвищення конкурентоспроможності, інноваційної спроможності та сталого розвитку малих підприємств у довгостроковій перспективі.

5.1. Conceptual foundations for building a SMART management model

The highly dynamic external environment, exacerbated by the digital transformation of the economy and frequent systemic shocks in recent years, requires small businesses to quickly adapt their management practices and tools. Conceptual research on SMART management models is key to developing theoretically sound approaches to the digital transformation of small businesses, as it allows strategic goals to be aligned with operational activities through the implementation of technological, analytical and process solutions.

For small businesses with limited resources, such models open up opportunities to improve decision-making efficiency, reduce transaction costs and enhance innovation capacity through a priority focus on digital platforms, cloud services and analytics tools. Of particular practical importance is the ability to strengthen the coordination of business processes through the implementation of SMART approaches. At the same time, the implementation of SMART models in small businesses faces a number of limitations: a lack of basic digital infrastructure, a shortage of management skills, cultural barriers, and the risks of disproportionate focus on individual technologies without a systematic strategy.

Aspects of SMART management in entrepreneurial structures, particularly in small business organisations, are currently being studied in the context of adaptive forecasting of structural changes in the development of entrepreneurship in the context of globalisation[79], the formation of sustainable synergies

[79] *Bielialov, T., & Hechbaia, V. (2023). Structural changes in the development of entrepreneurship under globalization: Assessment and adaptive forecasting. Smart Economy, Entrepreneurship and Security, 1(1), 43–52. https://doi.org/10.60022/sis.1.(01).4*

for the creation of integrated smart business models for the recovery of Ukraine and the EU[80], the digital transformation of small and medium-sized businesses in Ukraine using blockchain[81], digital innovations in the development of business processes[82], strategic planning based on digitalisation[83;84], strategic SMART management of localised business processes, the role of small and medium-sized business management in the era of digital globalisation[85], achieving sustainable efficiency of small enterprises[86], solutions for the implementation of SMART services for small and medium-sized businesses[87], strategic frameworks for digital transformation[88], development of sustainable growth

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[80] Boichenko, K., Shevchuk, N., Shvydka, O., & Kuzomko, V. (2023). Sustainable synergy: Creating integrated smart business models for the recovery of Ukraine and the EU. Financial and Credit Activity Problems of Theory and Practice, 5(52), 314–326. https://surl.li/fizwvx

[81] Borodina, A., Mohylevska, O., & Pererva, T. (2024). Digital transformation of small and medium-sized enterprises in Ukraine using blockchain technology. Kyiv Economic Scientific Journal, (7), 31–35. https://doi.org/10.32782/2786-765X/2024-7

[82] Izhevskyi, P. H., Samaricheva, T. A., & Kudelskyi, V. E. (2024). Digital innovations in the development of small businesses. Economy and Society. https://surl.li/vhqxou

[83] Loginova, O. (2024). Analysis of the impact of digitalization on the development opportunities of small and medium-sized enterprises. Economic Horizons, 2–3(28), 259–265. https://surl.li/fzpubz

[84] Mozghovyi, Ye. V. (2024). SMART technologies in entrepreneurial activity. Bulletin of Khmelnytskyi National University, (4). https://surl.li/iuyfgj

[85] Mladenova, I. (2024). SMEs in a digital era: The role of management. Behaviours, 14(11). https://shorturl.at/xyz2

[86] Emerald. (2023). Smart technology adoption: Impact on SME sustainable performance. https://shorturl.at/xyz3

[87] Nasirinejad, M. (2024). Challenges and solutions to adopt smart maintenance in SMEs. Elsevier / ScienceDirect. https://shorturl.at/xyz4

[88] Kaiser, E. Y. (2023). Small business success during 2020/2021. SJLT. https://shorturl.at/xyz5

cases[89], implementation of competitive innovations based on AI[90], development of the SmartPLS interlevel approach in coordination.[91]

The SMART management models developed by researchers (Table 5.1.1) are the conceptual basis for applied models and practices of business process coordination and the methodological basis for the development of business projects implemented in the context of the integration of various operations of integrated systems and business chains.

Table 5.1.1. Classification of SMART management models for enterprises[92;93;94;95;96]

Classification criteria	Types of SMART management models
1	*2*
By management level	Corporate SMART models – form a system of strategic management of digital processes at the enterprise or corporation level.

[89] *European Commission. (2023). Case study on SMART and sustainable growth: Supporting SMEs. https://shorturl.at/xyz8*

[90] *The Guardian. (2024). More time, less tedium: How AI is helping SMEs to innovate and compete. https://shorturl.at/xyz9*

[91] *Digital transformation strategies for effective business management in SMEs: A SmartPLS approach. (2025). ResearchGate. https://shorturl.at/xyz10*

[92] *Varuk, V. V. (2020). The impact of smart specialization development strategy on the welfare level of residents of united territorial communities. Business Inform, (7), 338–345. https://surl.lt/rxijnx*

[93] *OECD. (2023). SME and entrepreneurship outlook. OECD Publishing. https://shorturl.at/xyz1*

[94] *European Commission. (2023). Case study on smart and sustainable growth: Supporting SMEs. https://shorturl.at/xyz8*

[95] *The Guardian. (2024). More time, less tedium: How AI is helping SMEs to innovate and compete. https://shorturl.at/xyz9*

[96] *Digital transformation strategies for effective business management in SMEs: A SmartPLS approach. (2025). ResearchGate. https://shorturl.at/xyz10*

Continuation of table 5.1.1

1	*2*
By management level	Industry SMART models – focused on the digital transformation of a specific industry (agribusiness, manufacturing, logistics, education, etc.).
	Regional SMART models are used to manage the development of territories (SMART regions, SMART specialisation, SMART economy).
	Local SMART models are implemented at the level of a specific business process or functional unit (marketing, finance, HR).
By functional focus	SMART models of strategic management – ensure the setting of goals and monitoring of their achievement according to SMART criteria.
	SMART process management models – focused on optimising business processes using digital tools (Big Data, IoT, AI).
	SMART knowledge management models – aimed at creating, accumulating and using knowledge in a digital environment.
	SMART marketing management models – form adaptive marketing strategies based on analytics, customer data and artificial intelligence.
	SMART innovation management models – ensure the generation, selection and implementation of innovations using digital technologies.
By technological base	Data-driven SMART models – built on big data analytics and artificial intelligence.
	IoT-oriented SMART models – integrate the Internet of Things into production and management processes.
	Cloud-based SMART models – use cloud services to store, process and exchange management information.

Continuation of table 5.1.1

1	*2*
	Blockchain SMART models – based on the principles of transparency, data verification and trust in digital transactions.
	AI/ML SMART models – implement the functions of forecasting, adaptation and self-learning of management systems.
By degree of integration	Segmented SMART models – implemented within individual business functions.
	Integrated SMART models cover all management subsystems of an enterprise.
	Synergistic SMART models create a mutually reinforcing effect between information, technological and organisational components.
By target orientation	Effective SMART models are aimed at increasing productivity and reducing costs.
	Adaptive SMART models – ensure flexibility and resilience of the system to external changes.
	Innovative and creative SMART models – stimulate the development of new business ideas and products.
	Socially oriented SMART models – contribute to the development of human potential, corporate culture and sustainable development.
By level of digital maturity	SMART 1.0 – automation of individual processes.
	SMART 2.0 – integration of digital tools into the management system.
	SMART 3.0 – complete digital transformation and use of artificial intelligence for decision-making.

To select the conditions for integrating small business operations as integral SMART management systems, it is advisable to choose algorithms for integrating SMART management models using SMART industry step models, SMART

management information analytics, and innovative SMART management mechanisms:

1) Algorithm for integrating SMART management models with SMART industry step-by-step models:

- diagnosis of the degree of digital maturity of the enterprise;
- assessment of the level of implementation of digital technologies in production, logistics, marketing and management processes;
- determining the current level of SMART maturity according to the Capability Maturity Model (CMM).

2) Algorithm for forming a step-by-step model of SMART industry – development of a structural model with levels:

Level 1 – digital automation

Level 2 – networked systems

Level 3 – process intellectualisation

Level 4 – autonomous control

Level 5 – self-organisation and adaptability.

Reflecting the levels of SMART industry in the SMART management model – defining the functional area of management undergoing transformation: knowledge management, strategic planning, marketing, logistics, finance; synchronisation of management processes with digital platforms, integration of ERP, CRM and SCM systems into a single SMART industry information environment, resulting in the creation of a digital management circuit and adaptive decision-making systems; monitoring the effectiveness of integration determines the KPI of the integration effect: productivity, response speed, digital innovation.

3) Algorithm for integrating SMART management models with information and analytical systems:

- identification of data sources;
- creation of a unified information and analytical architecture;

- integration of data structures using Data Lake and Data Warehouse, which ensures the unification of analytical flows;
- modelling of SMART management analytical contours;
- integration of SMART management models into digital control panels;
- formation of SMART dashboards for monitoring business process performance indicators; provision of cognitive decision support;
- feedback and self-learning of the system;
- continuous updating of knowledge bases.

4) Algorithm for integrating SMART management models with innovative SMART management mechanisms:

- identification of innovative management determinants;
- formation of influencing factors (digitalisation, open innovation, ecosystem partnership, adaptive leadership models);
- creation of an innovative SMART management environment;
- implementation of open innovation, crowdsourcing, digital hubs and start-up platforms;
- modelling of innovative management mechanisms (development of models of innovative interaction (business networks), hybrid knowledge management (combination of human and machine intelligence), digital partnerships (platform-based cooperation);
- synergising management and technological innovations (combining intellectual technologies (AI, Big Data, Blockchain) with management models (Lean, Agile, Design Thinking));
- evaluating innovation performance;
- developing metrics for innovation capacity.

The integration of SMART management models based on SMART industry step-by-step models, information and analytical systems, and innovative management mechanisms forms a comprehensive architecture of the SMART economy of an enterprise. Such architecture ensures the transition from reactive to proactive management, increases the capacity for self-organisation, self-learning and sustainable development in the context of global competition.

If there are prospects for attracting small businesses to the business network system, it is advisable to choose algorithms for integrating SMART management models using the basic models «Business networks as objects of SMART management» and «SMART specialisation in the development of business networks», which will ensure the strategic harmonisation of the innovative development of the business network with the priorities of regional SMART specialisation and contribute to the formation of an innovation-oriented environment, the development of cluster interaction and the improvement of the technological capacity of enterprises.[97];[98]

The algorithm for integrating the model «Business networks as objects of SMART management» into the SMART management system of small businesses involves a transition from fragmented management of individual enterprises to systematic management of interconnected participants in the business ecosystem, in particular:

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[97] *Kravchuk, I. I., & Kovalchuk, V. V. (2025). Theoretical and methodological aspects of systemic marketing management in agribusiness. Economy and Society, (71). https://surl.li/vyczro*

[98] *Prysiiazhniuk, O., & Plotnikova, M. (2024). The role of operational strategy in ensuring the development of innovative entrepreneurship. Entrepreneurship and Innovation, (33), 117–122. https://doi.org/10.32782/2415-3583/33.20*

- Diagnostics of business network structures allows identifying system nodes that require digital transformation and determining the degree of potential interaction within the SMART ecosystem;
- forming a SMART platform for managing the interaction of network participants with the creation of a single digital space for the exchange of data, knowledge, analytics and management decisions;
- development of a system of SMART performance indicators with the definition of key performance indicators (KPIs) based on the SMART principle – specificity, measurability, achievability, relevance, time frame. Justification: SMART indicators provide a quantitative measurement of the effectiveness of integration processes and digital interaction;
- introduction of adaptive knowledge management mechanisms, allowing the network to respond to changes in demand, technological trends and innovation risks in real time;
- monitoring and optimisation of management decisions in a digital environment with the implementation of continuous feedback and correction of management parameters, which increases the degree of coordination of business processes, transparency of management, the level of digital competence of participants and the overall competitiveness of the network, whose participants are small businesses.

The algorithm for integrating the «SMART specialisation in business network development» model into the structure of strategic management by SMART management involves focusing resources and competencies on highly effective areas of innovative development that provide regional and sectoral competitive advantage. The main steps of this algorithm are:

- identification of dominant competencies and technological niches of business networks through SWOT analysis of innovation potential, determination of the strengths and unique competencies of participating enterprises, which will allow selecting area
- s in which the application of SMART specialisation will have the greatest effect;synchronisation of business network goals with regional and national SMART specialisation strategies based on aligning the goals of network participants with the priorities of state innovation development policy, which will ensure coordinated access to state support tools, innovation clusters and knowledge platforms;
- developing a roadmap for the business network's SMART specialisation, defining stages of development, resources, key technological projects, digital solutions and analytical management mechanisms, which will ensure a logical sequence of integration actions and control over their implementation;
- integration of analytical and digital SMART management tools into the specialisation process using digital platforms for data collection and analysis, market trend forecasting and development scenario modelling, which will increase the accuracy of management decisions and reduce risks when implementing innovative strategies;
- evaluating the effectiveness of SMART specialisation based on monitoring the innovative effect, competitiveness and socio-economic impact, which will allow adjusting the strategic directions of the network's development, maintaining a dynamic balance between efficiency and sustainability.

The conceptual basis for building SMART management of small businesses, based on the integration of these algorithms

and models, forms a unified intellectual management ecosystem that combines adaptability, analytical skills and strategic focus. This approach not only improves the efficiency of small business management, but also creates a methodological basis for their transition to an innovative digital development model in the context of globalisation and European integration transformations.

5.2. Integration of marketing communications and logistics optimisation into strategic management

The integration of marketing communications and logistics optimisation is a key component of the innovative smart management model for small businesses, as it ensures synergy between the company's market activity and its internal operational processes. In today's digital economy, it is the coordination of information flows, marketing influences and logistics decisions that determines the competitiveness of small businesses operating in an environment of highly dynamic demand, limited resources and the need for rapid adaptation[99].

The combination of marketing communications with logistics optimisation allows for the formation of a comprehensive management mechanism aimed at:

- improving the accuracy of demand forecasting;
- reducing costs for sales, delivery and order processing;

[99] *Hurzhii, N. H. (2023). Integrative interaction of marketing and logistics as a basis for strategic management of enterprises' sales activities in the international market. Scientific Bulletin of Uzhhorod National University, 12(9), 28–32.*

- forming timely personalised communications with customers;
- strengthening consumer loyalty by improving service and responsiveness.

Within the framework of smart management, such integration is based on the use of digital platforms, analytical tools, CRM/ERP systems, and automated logistics modules that ensure the synchronisation of marketing, sales, warehousing, transportation, and after-sales service processes.[100,101, 102.]

The use of business intelligence systems, customer behaviour analytics and predictive models allows for the creation of optimal delivery schedules, the adaptation of logistics routes and the provision of relevant marketing messages for specific market segments.

Small businesses are moving from traditional channels to multi-channel service, where logistics ensures fast processing of online orders, delivery time control, and integration with transportation services. This allows marketing communications to be accurate, timely, and relevant.

Chatbots, mobile applications, and automated communication funnels make it possible to combine customer information with supply chain management: notifications about product availability, delivery stages, and personalised offers based on order status.

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[100] *Blahun, I. I. (2025). Integration of logistics marketing and information management into the strategic development of business entities. Economy and Society, (76). https://doi.org/10.32782/2524-0072/2025-76-5*

[101] *Leonova, S., & Teplyuk, S. (2021). Integration of marketing and logistics in enterprise risk management using economic and mathematical modeling methods. Economy and Society, (32). https://doi.org/10.32782/2524-0072/2021-32-85*

[102] *Lin, Y.-H., Lin, F.-J., & Lai, P.-L. (2022). Omnichannel facility location and fulfillment optimization. Transportation Research, 11, 32–47. https://doi.org/10.1016/j.trb.2022.07.005*

Planning promotions, discounts, and promotional campaigns is based on an analysis of warehouse stocks, product turnover rates, and the ability of logistics partners to ensure stable deliveries. This minimises the risks of shortages and overloads.

Cost optimisation will mainly occur through shorter logistics cycles and more accurate marketing analytics and influences. Another effect will be increased flexibility and adaptability of business processes to fluctuations in demand. Increased profitability may result from better use of resources, faster customer service and more accurate product positioning. Another effect of combining marketing communications and logistics integration is the strengthening of the strategic stability of small businesses in an unstable market environment. Among the effects, we also consider the formation of a smart management ecosystem, in which digital tools ensure continuous data updates and automated decision-making.

Thus, the integration of marketing communications and logistics optimisation is a strategically important element of smart management for small businesses, allowing them to increase operational efficiency, strengthen their market position and ensure stable development in conditions of high competition and digital transformation of the economy. This approach contributes to the formation of a new management model focused on data, customer value, and cost minimisation, which meets the modern requirements of sustainable development and business process innovation. The implementation of an innovative smart management model in a small business environment requires a review of traditional management functions, in particular marketing communications and logistics. In a strategic context, the integration of these two areas is a key factor in increasing the competitiveness and adaptability of an enterprise.

The research results focus on the architecture, mechanisms and synergistic effects that arise when combining demand management and supply management (logistics) based on smart technologies.

The strategic integration of marketing communications and logistics optimisation is a key element of the innovative Smart Management model, as it ensures the implementation of structured and measurable SMART business goals. In an environment of growing competition and economic instability caused by external factors (including military action), strategic planning supported by technology allows for the rational allocation of available resources and the search for new avenues of development.

Smart integration is defined as the convergence of demand management (through marketing communications) and supply management (through logistics) functions, implemented on the basis of end-to-end digital technologies (such as Big Data, AI, IoT). The goal of this convergence is to ensure maximum customer value and increase flexibility in responding to the market, which in turn strengthens the overall competitiveness of small businesses.[103]

Logistics, in this context, takes on strategic importance. It ceases to be merely an operational function and becomes a critically important component in building competitiveness. Effective and targeted management of material and information flows is a prerequisite for the successful promotion of goods from manufacturer to consumer. Smart technologies enable businesses to adapt more effectively to rapid changes in the market environment and make informed strategic decisions.

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[103] *Rashchenko, A. V., & Les, A. V. (2025). Content innovation: The use of artificial intelligence for text and visual creation. Efficient Economy, (5). https://doi.org/10.32702/2307-2105.2025.5.70*

Research results show that strategic integration significantly changes the cause-and-effect relationship between marketing and logistics. Traditionally, logistics functions as a reactive system, fulfilling orders that have already been generated. The integration of marketing communications and logistics transforms logistics into a proactive function that is entirely driven by highly accurate demand forecasts. These forecasts, in turn, are obtained through marketing communications and sales analytics.

This paradigm shift is critical for small businesses, as their resources are always limited. Applying this principle minimises the two biggest threats to financial stability: the risk of excess inventory, which leads to frozen capital and increased storage costs, and the risk of shortages, which leads to customer loss and reputational damage. The synchronisation of marketing communications and logistics, enhanced by the use of integrated systems, creates synergy when marketing efforts (e.g., SMS campaigns targeting a specific product) directly correlate with the logistics system's readiness to execute them.

Effective smart integration requires the construction of an end-to-end digital architecture where core business functions (marketing, sales, logistics, accounting) operate as a single system, unified by centralised data exchange.

Customer relationship management (CRM) systems are a key hub for all marketing and sales processes. CRM helps companies maintain and develop relationships by tracking customer interactions with the brand, responding quickly to requests, and sending personalised updates or special offers.

Thanks to integration with marketing automation tools, CRM provides integrated marketing communications. This includes automating tasks such as audience segmentation, contact management, message personalisation, and integration with mobile marketing channels (SMS). CRM systems, especially combined and cloud-based ones, are suitable for any business,

from small to large, as they offer flexibility in configuration and a wide range of integrations with a relatively small initial investment.

On the supply side, optimisation is provided by smart logistics solutions, the key ones being warehouse management systems (WMS) and transport management systems (TMS).

TMS solutions are vital for optimising transport costs, which are a significant expense for small businesses. A transport management system uses data analysis to select the most efficient transport scheme, taking into account priorities such as transport costs, number of vehicles and minimum number of stops required. According to research findings, the implementation of TMS has demonstrated savings of up to 10% in transportation costs. TMS can be integrated with other key modules, including WMS, ERP (resource planning) and SCM (supply chain management), to create comprehensive control over material flows.

The strategic effectiveness of Smart Management is only achieved when CRM is integrated with other key business systems, including ERP and SCM. Integration solves critical problems associated with manual data entry and ensures centralisation of information.[104]

The key advantages of integration are: avoidance of duplication of information, improvement of customer service, and automation of order processing.

The integration of marketing communications and logistics optimisation creates powerful synergistic effects that significantly

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[104] *Tarasovych, L. V. (2022). Social marketing in Ukraine: Essence, technologies, and implementation challenges. In Accreditation of educational programs in the economic field under wartime conditions: Proceedings of the All-Ukrainian scientific and pedagogical advanced training in economic sciences (pp. 65–66). Lviv–Toruń: Liga-Pres. https://doi.org/10.36059/978-966-397-259-6-18*

exceed the sum of the effects of these systems operating separately. To evaluate the effectiveness of the integrated model, cross-functional performance indicators are needed that reflect the synergistic relationship between the front office and back office. The use of clearly defined performance indicators is the basis for making informed strategic decisions and optimising the overall business strategy (Table 5.2.1).

Table 5.2.1. Key performance indicators for evaluating integrated smart management of small businesses

Indicator	Smart Influence Mechanism	Value for small businesses
Order fulfilment rate	Smart Influence Mechanism	Increased reliability, minimised lost sales
Accuracy of demand forecasting	Using Big Data and AI/ML to analyse marketing communication trends and external factors	Increased reliability, minimised lost sales.
Customer lifetime value	Improving customer experience through transparent, fast and reliable delivery	Long-term revenue growth and loyalty
Time from order to delivery	Automating order processing (CRM → WMS) and optimising routes (TMS)	Increased competitiveness and operational speed
Profitability of marketing campaigns	Accurate tracking of lead sources, conversions and comparing them with actual delivery/fulfilment costs	Rational allocation of marketing budget and sound investments

Research into the integration of marketing communications and logistics optimisation in strategic smart management of small businesses confirms that this convergence is not merely a technical amalgamation, but a critical strategic prerequisite for enhancing competitiveness and sustainability.

5.3. Using digital technologies to support SMART management

In the context of the digital transformation of the economy, the introduction of digital technologies into the management system of small enterprises is becoming strategically important. SMART management, as a concept of intellectualisation of management processes, is based on the use of modern information and communication technologies, big data analytics, artificial intelligence, cloud services and the Internet of Things, which ensure the adaptability, flexibility and effectiveness of management decisions, and are critically important for small businesses in a highly competitive and dynamic market environment. The digitalisation of management mechanisms in small enterprises is particularly relevant due to their limited financial and human resources, which slows down the automation of typical operations, prevents the expansion of sales channels through electronic platforms, and hinders the formation of digital business ecosystems at the local and regional levels. In this context, digital solutions are becoming a key tool for implementing the principles of SMART management – Specific, Measurable, Achievable, Relevant, Time-bound – ensuring the measurability of results, the achievement of goals, and the strategic coordination of management actions.

The use of digital technologies in SMART management of small businesses is not only an innovative way to increase their

competitiveness, but also a necessary condition for integration into modern business networks and industrial platforms. The digitalisation of management creates the basis for the development of intelligent decision-making systems, the formation of sustainable business models and the strategic stability of small businesses in the global digital economy. Mechanisms to support the use of digital technologies in SMART management of small businesses should be developed based on: the theory of information capital in the context of small business development, the methodology of architecture and design of information and analytical systems for SMART management of small businesses, the organisation of SMART dashboards, forecasting systems and models of management analytics in small businesses. According to the theory of information capital, information is defined as a strategic resource that has the properties of capital: accumulation, reproduction, transformation and a multiplicative effect on the economic efficiency of an enterprise. In the context of small business development, it is proposed to form assessment metrics for the value of information, the degree of integration of information flows, criteria for assessing the convergence of knowledge and data in the system of information capital development, dynamism and updating, and communicative interaction.[105]

The composition of the postulates of the architecture of information and analytical systems for SMART management of small enterprises involves the construction of a multi-level structure that combines functional, analytical, cognitive and management subsystems. The architecture is based on an integration core that provides communication between data

[105] *Lavrynenko, S., Zelinska, A., Tarasovych, L., & Bilych, V. (2025). Digitalization and transparency: Innovative activity in logistics management. Sustainable Development of the Economy, (3)(54), 58–63. https://doi.org/10.32782/2308-1988/2025-54-9*

sources, digital sensors, knowledge bases and management interfaces.

The key structural components are: Data Layer (data warehouses, metadata bases, cloud and hybrid information processing platforms); Analytics Layer: provides the use of machine learning methods, intelligent data processing, business scenario modelling; the management layer (Management Layer) – the formation of digital interfaces for SMART management for operational and strategic decision-making; the visualisation layer (Visualisation Layer) – the implementation of adaptive interfaces.[106]

The design of information and analytical systems is based on the principles of interactivity, modularity, flexibility, and scalability, which allows small businesses to adapt the system to their own business processes. The construction of SMART dashboards, forecasting systems, and management analytics models in small businesses is based on the concept of data-driven management. SMART dashboards are integrated analytical tools that visualise key performance indicators (KPIs), allow you to monitor process dynamics and evaluate the results of management decisions in real time.

The main principles of construction include semantic data structuring (the formation of a unified system of indicators and metrics that are consistent with the goals of SMART management), predictive analytics (the use of statistical modelling, artificial intelligence and machine learning methods to predict business development trends, demand, risks and financial results); interactive visualisation (providing convenient access to information through dynamic graphs, indicators, heat maps and diagrams), which leads to the formation of the core of the small

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[106] Kravchuk, I. I., Tarasovych, L. V., Lavrynenko, S. O., et al. (2024). Management: A study guide (I. I. Kravchuk & L. V. Tarasovych, Eds.). Polissia National University.

business analytical environment, contributing to the transformation of management practices towards digital adaptability, intellectual flexibility and strategic predictability.

An algorithm is proposed for developing an innovative model of SMART management for small businesses, which can be formed on the basis of outsourcing relationships between small enterprises and consulting and IT firms. The advantage of such interaction is the ability to assess the potential of a small enterprise to introduce and maintain a SMART management system and the ability to optimise the cost of an information product for the developer company. A formalised step-by-step algorithm is presented for the quantitative and qualitative assessment of the «SMART management format» of small enterprises as elements of a business network, taking into account: SMART management as an object, SMART specialisation, SMART industry, information and analytical support, innovative mechanisms of SMART management, knowledge management, digital platforms/ecosystems, development strategies; as well as depending on the industry, degree of virtualisation and level of digital literacy of personnel:

- defining the goal, scope and initial data for obtaining the SMART Management Index (ISM) for each small enterprise in the business network and classifying the readiness/maturity level (maturity class) for each network participant, collecting data on a list of indicators using questionnaires, IT log metrics, ERP/CRM exports, expert case interviews, and ecosystem interaction indicators;
- forming a system of dimensions and indicators, in particular, using a methodology of complex evaluation characteristics to form a composite SMART management index for small enterprises (Fig. 5.3.1);

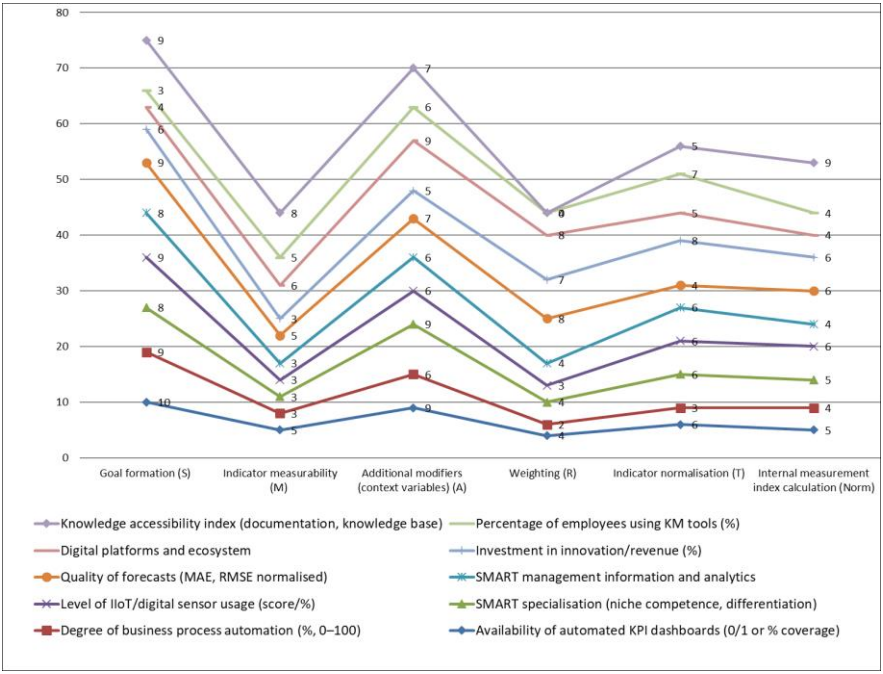

Figure 5.3.1. Set of evaluation characteristics for constructing a composite index of SMART management of small enterprises

The set of assessment characteristics forms the conceptual and methodological basis for constructing a composite index of SMART management of small enterprises. Its significance lies in the ability to provide a comprehensive, multidimensional and structurally balanced measurement of the level of digital competence, managerial and innovative maturity of small business entities in terms of business coordination based on the principles of SMART management:

- establishing additional modifiers (contextual variables) – the level of digital skills of personnel (the result of testing/certification or self-assessment), the degree of virtualisation, benchmark industry standards (Fig. 5.3.2);

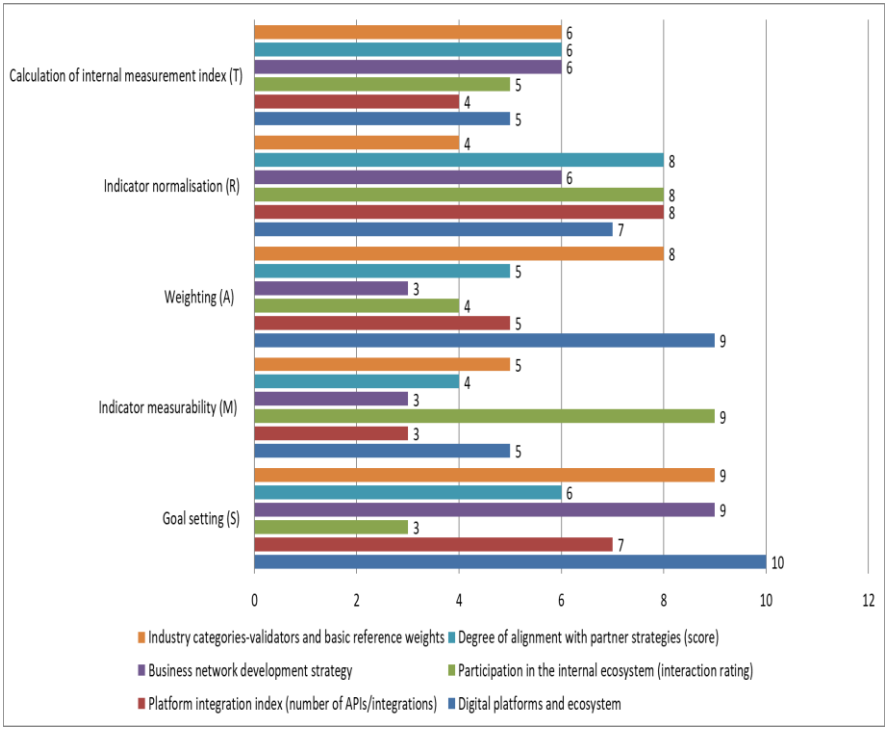

Figure 5.3.2. Modifiers for developing an innovative model of SMART management for small enterprises

- assigning weights – weights are determined using an expert method (AHP), an equal distribution method, or statistical methods (PCA) and justifying the choice of weights with documentation;
- normalisation of indicators – conversion of «raw» indicators into points, use of «clean» metrics, reverse formulas;
- calculation of the internal measurement index (aggregation of points);
- contextual correction by industry, virtualisation and skill level;
- classification of maturity levels (maturity classes);
- sensitivity analysis and scenario analysis – performing

single-factor and multi-factor sensitivity, assessing classification stability, scenario characteristics («realistic», «aggressive digitalisation», «minimum investment»);

- verification and validation – expert-validated sample of companies (hold-out) to verify the correlation of ISM with independent measurements (e.g., revenue growth rate, productivity, degree of network integration);
- output results and recommendations (for each enterprise participating in the network (numerical values) establishing the maturity class, the five weakest indicators (ranked by contribution to the deficit), rules for generating forecasts for priority measures; recommendations are generated by the «s-to-action» rule and include proposals for specific measures (automation, training programmes, API integration, partner pilots).

The development of an innovative SMART management model for small businesses is a key prerequisite for increasing the competitiveness, adaptability and sustainability of modern entrepreneurial structures in the context of digital transformation and growing market turbulence. The feasibility of building such a model is based on the need for systematic integration of the conceptual foundations of the SMART approach, which ensure transparency, measurability, adaptability, and intellectual support for management decisions.

The use of the conceptual foundations of SMART management creates a methodological platform for comprehensive assessment and optimisation of business processes, allows for the unification of performance criteria and the formation of a holistic management framework based on digital metrics. The application of marketing communications integration and logistics optimisation formats in strategic management enhances the synergistic effect of management decisions, ensuring a balance of information flows, resources and interactions between key small business stakeholders.

Digital technologies, in turn, are a fundamental tool for supporting SMART management, as they enable automated data processing, interactive management processes, improved forecasting accuracy and adaptability of strategic decisions. The design of information and analytical systems focused on modularity, visualisation, and rapid access to analytics ensures the effective implementation of the SMART management model in the activities of small enterprises.

Of particular importance is the creation of a composite SMART management index, which is an integral tool for quantitatively assessing the level of development of SMART competencies in small businesses. The composite index allows for the objectification of data on management efficiency, the identification of strategic gaps, the determination of priority areas for innovative improvement, and enables comparative analysis between enterprises or industry groups.

Thus, the innovative model of SMART management of small businesses, built on the integration of conceptual principles, marketing and logistics infrastructure, digital technologies and information and analytical systems with a composite index, forms a holistic, adaptive and scientifically sound architecture of strategic management. It serves as a foundation for improving business performance, strengthening its innovative potential and ensuring sustainable development in the long term.

CHAPTER 6

PRACTICAL RECOMMENDATIONS AND PROSPECTS FOR IMPLEMENTING THE SMART MANAGEMENT MODEL

ПРАКТИЧНІ РЕКОМЕНДАЦІЇ ТА ПЕРСПЕКТИВИ ВПРОВАДЖЕННЯ МОДЕЛІ SMART-МЕНЕДЖМЕНТУ

Practical recommendations for implementing the SMART management model in small businesses are summarised and the conditions for its effective implementation are substantiated. Key prerequisites for applying SMART approaches are identified, in particular the transformation of the organisational structure, the development of digital competencies of personnel, the formation of an innovative corporate culture and the development of modern IT infrastructure. The results of the model's implementation are substantiated, consisting of cost optimisation, increased financial stability and management efficiency, as well as increased flexibility of business processes and competitiveness of enterprises. The prospects for the development of SMART management of small businesses in Ukraine are outlined, taking into account global trends, European integration processes, and the impact of intellectual technologies on the formation of sustainable business models.

Узагальнено практичні рекомендації щодо впровадження моделі SMART-менеджменту в малому бізнесі та обґрунтовано умови її ефективної реалізації. Визначено ключові передумови застосування SMART-підходів, зокрема трансформацію організаційної структури, розвиток цифрових компетенцій персоналу, формування інноваційної корпоративної культури та розбудову сучасної IT-інфраструктури. Обґрунтовано результати впровадження моделі, що полягають в оптимізації витрат, підвищенні фінансової стійкості та ефективності управління, а також у зростанні гнучкості бізнес-процесів і конкурентоспроможності підприємств. Окреслено перспективи розвитку SMART-менеджменту малого бізнесу в Україні з урахуванням глобальних трендів, євроінтеграційних процесів і впливу інтелектуальних технологій на формування сталих бізнес-моделей.

6.1. Organizational and economic conditions for implementing the SMART management model

Implementing the SMART management model in a company involves creating a set of organisational and economic conditions that ensure the effective implementation of intelligent, digital and analytical management tools. Within the framework of modern transformations in the business environment, characterised by a high level of competition, dynamic consumer demand and the active development of information technologies, the transition to SMART approaches is becoming a necessary prerequisite for increasing the effectiveness and competitiveness of a company.

SMART management is based on the use of automated systems, big data, artificial intelligence, digital communication channels, and flexible management principles. Therefore, its implementation is only possible if the company has the necessary resources, organisational structure, human resources, technical infrastructure, and economic capabilities.

The effective implementation of the SMART model requires the modernisation of the existing management structure.

The main prerequisites for this approach are:

- creating a separate department or working group responsible for digital transformation and the implementation of new management technologies;
- optimising communication flows, ensuring rapid information exchange between departments through digital management systems;
- delegating authority and increasing the autonomy of departments, allowing them to respond quickly to market changes;

- implementing a process-based approach that enhances the manageability of business processes through their digital formalisation and automation.

SMART management in a modern enterprise requires highly qualified employees who not only possess basic management skills, but are also able to work effectively with digital platforms, analytical tools and artificial intelligence technologies. In today's business management environment, digital technologies are becoming not just a supporting tool, but the basis of operational activities, so staff competence in working with intelligent systems is critical to the successful implementation of SMART management. The company must create favourable conditions for improving the qualifications of employees, developing their digital skills and forming a culture of using innovative technologies in their daily work. First and foremost, it is necessary to ensure the systematic improvement of staff digital literacy through various forms of training, including internal training, participation in external educational programmes and online courses. Such training should cover all key aspects of working with digital platforms, from the basics of analytics and data management to complex forecasting tools, process automation, and the use of artificial intelligence algorithms to support management decisions. Regular training not only improves the technical skills of employees, but also stimulates their interest in applying new technologies in their daily activities, which contributes to the more effective implementation of SMART tools in the company's work.[107]

Another important element is attracting highly qualified specialists in IT, analytics, digital marketing, and data management to the team. Having such specialists allows the company not only to implement technologies but also to adapt

[107] *Rashchenko, A. V., & Les, A. V. (2025). Content innovation: The use of artificial intelligence for text and visual creation. Efficient Economy, (5). https://doi.org/10.32702/2307-2105.2025.5.70*

them to specific business needs, integrate them into internal processes, ensure the smooth operation of digital platforms, and provide timely analysis of information. IT and analytics specialists act as key drivers of digital transformation, responsible for the correct configuration of systems, integration of tools, and ensuring high data quality, which in turn increases the accuracy of management decisions and the efficiency of business processes. At the same time, digital marketing allows a company to segment its customers more accurately, create personalised offers, increase consumer loyalty and respond quickly to market changes, which becomes an additional factor in competitiveness.

An equally important aspect is the development of a corporate culture of innovation, which includes encouraging employees to take initiative and introduce new technologies into their daily activities. The company must create an environment where employees feel supported when trying out new ideas, suggesting process improvements, and experimenting with digital tools. The formation of such a culture involves the implementation of communication systems that allow employees to share best practices, exchange experiences, and receive feedback from management and colleagues. A positive corporate culture not only promotes the active use of innovation, but also increases staff motivation, engagement and loyalty to the company, which is critical to the successful functioning of SMART management.

A key tool for supporting effective staff performance is a motivation system focused on the effective implementation of digital tools and improvement of business processes. Such a system may include financial incentives, bonuses for achieving KPIs, as well as non-material incentives, such as recognition of employee achievements, provision of opportunities for professional development, or participation in strategic projects. The implementation of a motivational system encourages employees to not only perform their duties, but also actively seek

ways to optimise processes, increase productivity, and utilise the latest digital solutions. This aspect is particularly important for small and medium-sized businesses, where the impact of each employee on the overall result is significant and directly determines the efficiency of the enterprise.

Thus, effective implementation of SMART management requires a comprehensive approach to personnel development, including improving digital literacy, attracting high-level specialists, developing a culture of innovation, and establishing an effective motivation system. These measures create the conditions for the successful use of digital platforms, analytical tools and artificial intelligence technologies, enabling the company to improve management efficiency, optimise resources, reduce costs and increase competitiveness. The integration of these elements into everyday activities forms a new management model focused on innovation, efficiency, and the strategic adaptability of the enterprise to changes in the market environment, which is a key prerequisite for success in today's economy.

The transition to SMART management requires a review of internal regulations:

- updating job descriptions in line with new competencies;
- implementing data security and cyber protection policies;
- standardising processes that are being digitised (marketing, accounting, logistics, communications);
- adopting regulations for working with analytical systems and AI modules.[108]

The implementation of SMART approaches requires significant financial investment, as it involves the purchase of specialised software, CRM/ERP systems and analytical platforms.

[108] *Rashchenko, A. V., & Les, A. V. (2025). The role of artificial intelligence in the transformation of modern marketing practices. Investments: Practice and Experience, (6), 66–70. https://doi.org/10.32702/2306-6814.2025.6.66*

Additional costs may be associated with the purchase of server equipment or payment for cloud services that ensure data stability and security. An important area of funding is staff training, as effective work with digital tools requires appropriate employee qualifications. It is also necessary to upgrade the technical base, including computers and network equipment that support modern standards. When implementing IoT solutions, it may be necessary to modernize the infrastructure of the filling station to enable the integration of intelligent systems into current business processes.[109]

Investments should be viewed as long-term investments that significantly improve the efficiency of the enterprise, reduce costs and increase profitability.

The implementation of SMART management allows for a reduction in a number of current expenses:

- process automation reduces the need for manual labour;
- digital tools increase the accuracy of planning and forecasting;
- the procurement and logistics system is optimised;
- losses due to human error are reduced.

Thus, even with initial investments, the implementation of the SMART model creates the economic conditions for increased profitability.

For the successful implementation of SMART projects, the company must ensure sufficient liquidity to enable stable financing of digital solutions. It is also important to create a reserve fund to support innovative initiatives and cover potential risks. One of the key factors is the company's ability to attract external investment or credit resources that can accelerate the

[109] *Lavrynenko, S. O., Kravchuk, I. I., & Budnik, O. M. (2024). Modern ERP technologies as an effective component of organizational management systems. Economy and Society, (62). https://doi.org/10.32782/2524-0072/2024-62-37*

modernisation of business processes. In addition, effective management of financial flows using digital tools helps to improve control, transparency and speed of decision-making. Together, these financial conditions create a solid foundation for the implementation of SMART management.

The technical readiness of an enterprise is the foundation of the SMART model and determines the company's ability to operate in a digitally integrated environment. In the diagram (Fig. 6.1.1), this component is represented as a base layer covering Internet infrastructure, hardware resources, cyber security, and data collection tools.

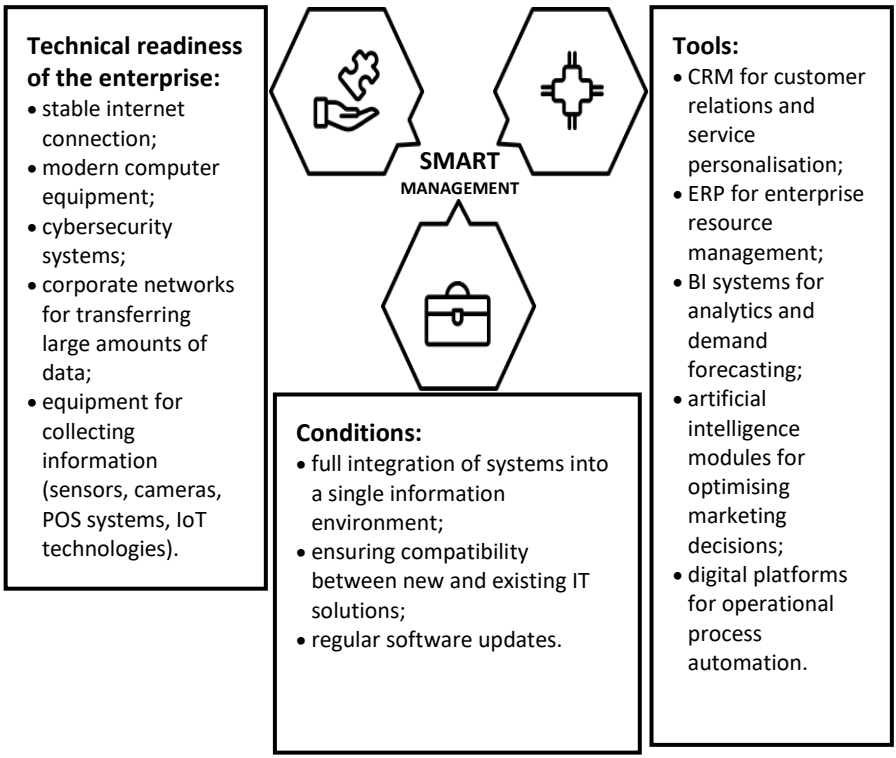

Figure 6.1.1. Specific conditions for the implementation of SMART management in an enterprise

The next level is formed by digital tools – CRM, ERP, BI systems, and AI modules that provide analytics, personalisation, and operational efficiency. They interact with each other through corporate networks, creating end-to-end data flows for management decision-making. The key logic of the scheme is that these tools can only realise their potential if they are integrated into a single information ecosystem. A separate block emphasises the need for compatibility between new and existing IT solutions, as technological gaps pose risks to the stability of business processes. The final element highlights the importance of regularly updating software, which keeps systems up to date and ensures the smooth operation of the SMART model in a dynamic digital environment.

The company needs to:

- ✓ encourage creativity and initiative;
- ✓ ensure openness to change;
- ✓ create positive motivation for the use of new technologies.

The success of the model's implementation largely depends on a clear phased approach to change, which allows the company to gradually adapt to new processes and technologies. It is important to ensure transparent and regular communication with staff so that employees understand the purpose of the transformations and their role in them. Active support from management, which should act as an example and a driving force for change, also plays a significant role. Particular attention should be paid to minimising resistance to change through training, engagement and motivation of employees. All these factors together create favourable conditions for the successful implementation of SMART management.

The SMART system requires effective interaction between employees:

- ✓ internal portals and messengers;
- ✓ automated reporting systems;

- ✓ regular feedback.

The organisational and economic conditions for implementing the SMART management model form a set of factors that ensure the successful digital transformation of an enterprise. They include the development of an organisational structure, staff training, investment support, the creation of a modern IT infrastructure, and the formation of an innovative corporate culture.

Comprehensive implementation of these conditions will enable the enterprise to improve management efficiency, optimise costs, improve decision-making quality, and enhance competitiveness in the long term.

6.2. Expected results of SMART management implementation: efficiency, flexibility, competitiveness

The implementation of SMART management in modern enterprises is a strategically important step that makes it possible to significantly increase the level of management efficiency, ensure the flexibility of business processes, strengthen competitive positions, and create the conditions for long-term development. SMART management is based on the use of digital tools, artificial intelligence, big data analytics, automation, and optimisation of internal processes. The main expected results of its implementation include economic, organisational, technological, and strategic effects that shape a new quality of enterprise management in a changing business environment.

First and foremost, SMART management contributes to improving the overall efficiency of the enterprise. Business process automation significantly reduces the human factor, cuts down on the time spent on routine operations, and increases the

accuracy and speed of information processing. A key advantage is the ability to use large data sets for management decision-making, which allows management to respond quickly to changes in market conditions, adjust development strategies, optimise operations, and increase labour productivity. These results are largely due to the introduction of intelligent forecasting systems that can analyse consumer behaviour, identify demand trends, assess financial risks, and propose the most effective development scenarios.

The second important area of influence is increasing the flexibility of the enterprise, which is critically important in a dynamic external environment, economic instability and increasing competition. SMART management allows you to form flexible organisational structures that quickly adapt to change. With the help of digital systems, coordination between departments becomes transparent and more efficient, which reduces decision-making time and ensures rapid execution of operational tasks. Flexibility is also manifested in the ability of an enterprise to quickly change its business model, respond to customer behaviour, introduce new service or product formats, and use adaptive resource management systems. The use of cloud technologies allows IT infrastructure to be scaled according to the needs of the company, which reduces costs and increases resistance to external influences.[110]

One of the key expected results of implementing SMART management is a significant increase in the competitiveness of the enterprise. Companies that use intelligent technologies are able to provide higher quality service, implement personalised offers, create individual customer experiences and apply effective

[110] *Prysiiazhniuk, O., & Plotnikova, M. (2024). The role of operational strategy in ensuring the development of innovative entrepreneurship. Entrepreneurship and Innovation, (33), 117–122. https://doi.org/10.32782/2415-3583/33.20*

marketing tools that take into account consumer behaviour in real time. Thanks to the use of analytical platforms, enterprises are able to create unique competitive advantages, predict market behaviour, optimise pricing, quickly implement innovations, and promptly identify new niches for development. Such opportunities allow the enterprise to strengthen its position not only locally but also internationally.

Another important expected result is an increase in the transparency and manageability of business processes. SMART management provides complete control over operational activities, financial flows, logistics, inventory, and customer interactions. All processes are recorded in a digital environment, which allows them to be managed in real time, quickly identify shortcomings, analyse the effectiveness of departments and increase staff accountability. Transparency helps reduce financial losses, minimise fraud risks, and create a healthy corporate climate in which employees better understand their roles and importance in the overall management system.

Companies that implement SMART management also expect significant cost reductions through resource optimisation, document flow automation, improved logistics and more accurate procurement planning. The use of artificial intelligence algorithms allows for the optimisation of marketing, energy consumption and maintenance costs, as well as reducing costs associated with inefficient use of personnel. In such conditions, the profitability of the enterprise increases, financial results improve and opportunities for investment in new areas of activity arise.

Improved customer interaction, which is an important part of SMART management, should be highlighted separately. Thanks to the use of CRM systems, chatbots, personalised services and customer behaviour analytics, the company is able to create competitive marketing programmes, develop individual offers and ensure a high level of customer satisfaction. This has a positive

effect on loyalty, repeat sales and brand reputation, which in the long term strengthens the company's position in the market.

Another expected result is an increase in the company's innovation. SMART management stimulates the development of a corporate culture focused on change, learning and the implementation of new ideas. Employees gain access to modern tools that expand their professional capabilities and increase motivation. The enterprise, in turn, gains the ability to form a long-term innovation strategy, introduce new products and services, and quickly test and launch new projects, which significantly accelerates development and expands market opportunities.

Thus, the expected results of implementing SMART management cover a wide range of positive changes that ensure increased efficiency and stability of the enterprise's activities. The introduction of intelligent technologies allows for increased flexibility of business processes, ensures their adaptability to unstable market conditions, reduces costs, optimises internal processes, and increases competitiveness. SMART management is a key element of an enterprise's digital transformation strategy, forming the foundation for successful long-term development. As a result, the enterprise receives a modern management platform that allows it not only to function effectively, but also to ensure sustainable growth, innovation and a high level of market activity in the context of global change and digital competition.

The implementation of the SMART management model in an enterprise is of strategic importance for improving management efficiency, optimising resources and strengthening competitive positions in the market. The practical implementation of this model requires a comprehensive approach that includes analysis of existing business processes, adaptation of digital solutions, development of human resources, and gradual integration of innovative management practices into the daily activities of the enterprise (Fig. 6.2.1).

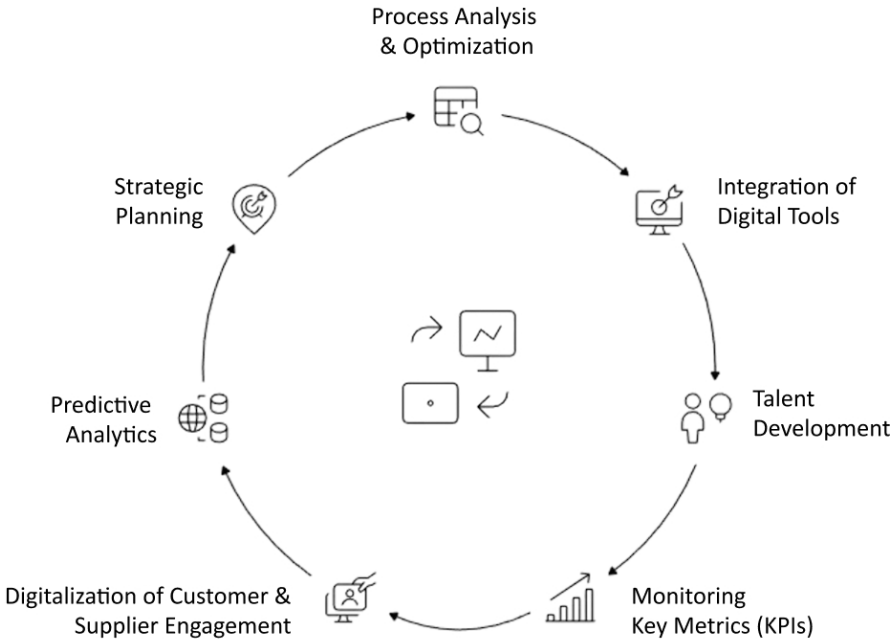

Figure 6.2.1. Implementation of the SMART management model in an enterprise

The first step is a detailed assessment of the current state of organisational processes, their transparency and effectiveness. Such an audit allows you to identify critical points and priorities that require automation, analytical support or a review of management decisions. Based on the audit results, a roadmap for implementing SMART approaches should be developed, which will define the stages of digitalisation, the necessary resources and key performance indicators (KPI) that allow progress and results of changes to be assessed.

The next practical step is to integrate information systems that provide data management, analytics, and business process automation. It is advisable for the enterprise to implement

modern CRM systems for effective customer relationship management, sales automation, and consumer behaviour data collection. The implementation of an ERP system will allow you to control financial flows, inventory management, logistics and production processes, which will help optimise costs and increase the transparency of management decisions. It is also worth integrating digital analytical tools that provide demand forecasting, evaluation of the effectiveness of marketing activities and strategic planning of the enterprise's activities.

Particular attention should be paid to developing human resources and forming a corporate culture focused on innovation and change. Company staff must possess digital skills, understand the principles of working with analytical systems, and be prepared to adapt business processes in line with new management standards. To this end, it is advisable to organise regular training programmes and workshops on the use of CRM and ERP systems and analytical platforms, as well as to improve the digital literacy of employees at all levels of management. The development of human capital ensures the effective operation of the technologies implemented and maximises the benefits of automation.

In addition, it is important for the enterprise to use systems for monitoring and controlling key performance indicators. The implementation of tools for tracking KPIs in real time allows you to quickly identify deviations from planned indicators, respond promptly to problems, and make informed management decisions. This contributes to increasing the transparency of the enterprise's activities, strengthening discipline and responsibility among employees, and forms the basis for strategic planning and data-driven decision-making.

Another key recommendation is the gradual introduction of innovations in interactions with customers and suppliers. Companies can use digital platforms to automate communications, optimise logistics, implement electronic

document management, and develop personalised loyalty programmes. The use of smart solutions improves service quality, reduces order fulfilment times, and increases customer satisfaction, which directly affects a company's competitiveness.

Another area of focus is the integration of predictive analytics and strategic planning. The use of algorithms for demand forecasting, risk assessment, resource optimisation, and market trend analysis allows for increased adaptability to changes in the external environment, rapid response to market fluctuations, and effective resource allocation. This ensures operational stability, cost reduction, and increased financial stability for the enterprise.

The prospects for the development of SMART management in an enterprise are linked to the gradual digitisation of all management processes and the integration of the enterprise into modern SMART ecosystems. The use of artificial intelligence, automation, big data analytics, cloud services, and mobile solutions opens up opportunities to improve management efficiency, optimise production processes, and improve logistics and financial control. Further development of the model will allow the enterprise not only to increase productivity and reduce costs, but also to form unique competitive advantages, ensure resistance to external influences, and effectively respond to changes in the market environment.

In general, the implementation of SMART management opens up strategic prospects for improving the efficiency, flexibility, and competitiveness of the enterprise. Practical recommendations focus on a comprehensive approach: process analysis and optimisation, integration of digital tools, human resource development, monitoring of key indicators, digitalisation of interactions with customers and suppliers, predictive analytics and strategic planning. The implementation of these measures creates conditions for sustainable development, increased market

efficiency and the strengthening of the position of small businesses in domestic and foreign markets, making SMART management a key element of the enterprise's future strategy.

6.3. Prospects for the development of SMART management of small businesses in Ukraine and worldwide

The prospects for the development of smart management of small businesses in Ukraine and worldwide are shaped by global transformations of economic systems, rapid development of digital technologies, changes in consumer behaviour patterns, and the growing need for businesses to increase flexibility and adaptability. SMART management as a concept integrates modern information technologies, analytical tools, intelligent solutions and new approaches to business process organisation into a single system. Its key idea is to build management based on data, automation, optimisation and the ability of an enterprise to respond quickly to changes in the external environment. This is especially important for small businesses, as they are most affected by market fluctuations, demand instability, resource constraints, and competitive pressure. In these conditions, SMART management becomes a critical tool for improving efficiency, economic stability, and long-term development.

On a global scale, the development of SMART management is driven by the overall digitalisation of the economy, the transformation of traditional business models, and the transition of enterprises to automated, analytical, and adaptive management systems. The spread of artificial intelligence, machine learning, the Internet of Things, cloud services, robotisation, big data and digital platforms has significantly changed the possibilities for management decisions. For small

businesses, which previously did not have access to such tools due to their high cost or technological complexity, new horizons are now opening up. There is already a rapid growth in the popularity of intelligent CRM systems, automated marketing, electronic communication systems, financial analytics, cyber security and logistics tools that enable small businesses to operate more efficiently and at lower cost.

One of the main global trends shaping the future of SMART management is the growing role of data in management decision-making. Most modern companies are moving towards data-driven models based on reliable real-time data collection, storage and analysis. For small businesses, this means the ability to accurately predict customer needs, optimise purchasing, manage inventory, control costs and create personalised offers. This trend will only intensify in the future as analytical technologies become more accessible, easier to integrate and user-friendly for those without special technical skills.

The global prospects for the development of SMART management are also linked to changes in the way we work. The spread of remote working, flexible schedules and distributed teams is encouraging companies to implement digital tools for team management, performance monitoring, task automation and corporate culture support. For small businesses, which often have limited staff and need maximum employee efficiency, this opens up opportunities to reduce administrative costs, optimise processes and increase productivity.

Another key factor is the growing role of digital platforms and ecosystems. Modern small businesses are actively integrating into e-commerce platforms, digital marketplaces, financial services platforms, advertising environments, and logistics services. In this context, SMART management is becoming a necessity for working effectively with a large number of digital interaction channels. In the future, small businesses are expected

to become even more integrated into digital ecosystems that will offer comprehensive solutions, from order management to financial analysis and marketing automation.

The prospect of cybersecurity development deserves special attention. With the growth of digitalisation, the number of threats that can harm small businesses with limited resources for protection is also growing. Therefore, SMART management will include not only optimisation tools, but also modern solutions for data protection, secure information storage, user identification and real-time risk monitoring. This trend is actively developing around the world and will become critically important for Ukraine as well.

The prospects for SMART management of small businesses in Ukraine have their own specific characteristics. Ukraine is undergoing profound transformations: the digitisation of public services, reforms, European integration, the growth of the IT sector and the emergence of a large number of start-ups are creating a favourable environment for the introduction of modern technologies into business. Ukrainian entrepreneurs demonstrate a high level of adaptability and ability to implement innovations, which is important for the development of SMART approaches.

At the same time, Ukrainian small businesses face challenges related to economic instability, military actions, logistical constraints, and a decline in the purchasing power of the population. In these conditions, smart management becomes a tool for survival: automation allows you to reduce costs, digital channels allow you to expand market coverage, analytics allow you to minimise risks, and online solutions ensure business continuity. In the future, Ukrainian companies are expected to increasingly switch to comprehensive digital solutions, as the market requires speed of response, accuracy of forecasts, and optimal use of resources.

An important prospect is the growing role of Ukrainian IT companies in developing SMART solutions for small businesses. The domestic market already offers modern CRM, ERP, analytics

systems, and AI-based solutions that are adapted to local conditions and affordable. In the future, the expansion of such products and their export potential is predicted, which will contribute to the development of the SMART ecosystem.

Equally important is the prospect of human resource development: digital skills are becoming essential for all small business employees, and companies will invest in training, professional development, and the formation of a digital corporate culture. SMART management is impossible without the appropriate staff competence, so human capital development will be a key success factor.

In the global future, SMART management will become the standard for small business management. Its development will be driven by new-generation artificial intelligence technologies, integrated management ecosystems, automated business models, expanded e-commerce capabilities, the development of unmanned logistics, personalised marketing and intelligent digital assistants. Small businesses will gain access to technologies that were previously only available to large corporations, which will help level the competitive playing field.

Thus, the prospects for the development of SMART management of small businesses in Ukraine and worldwide are extremely favourable. Global technological trends, the growing availability of digital solutions, the development of online ecosystems, and the need for businesses to be adaptable are creating conditions for the large-scale implementation of SMART approaches. For Ukraine, this is not only an opportunity to increase the efficiency of entrepreneurship, but also an important factor in economic recovery, integration into the European market, and ensuring competitiveness at the international level. SMART management will become the foundation of a new model of small business development based on innovation, flexibility, digital competence, and a strategic focus on the future.

CHAPTER 7

MANAGEMENT OF DIGITAL SERVICES TO SUPPORT SMALL BUSINESSES IN LOCAL COMMUNITIES

МЕНЕДЖМЕНТ ЦИФРОВИХ СЕРВІСІВ ПІДТРИМКИ МАЛОГО БІЗНЕСУ В ТЕРИТОРІАЛЬНИХ ГРОМАДАХ

The digitization of territorial communities has been studied as a key tool for overcoming investment barriers to small business development in conditions of limited resources and the consequences of war. Factors contributing to the low investment attractiveness of communities have been identified, in particular, limited access to financing for small businesses. The role of the Polissya Center for Digital Innovation (POLIDIH) as a platform for the digital transformation of rural areas has been substantiated. Based on geoinformation and satellite data, it increases the transparency of management and the investment attractiveness of communities, promoting the development of smart specializations and support for small businesses. The key tool is the community's geo-investment passport, which transforms the territory into an understandable and comparable object for investors and acts as an element of a unified investment ecosystem. It is concluded that the sustainable development of small businesses is only possible if an integrated digital and management ecosystem is formed at the community level.

Досліджено цифровізацію територіальних громад як ключовий інструмент подолання інвестиційних бар'єрів розвитку малого бізнесу в умовах обмежених ресурсів та наслідків війни. Визначено чинники низької інвестиційної привабливості громад, зокрема обмежений доступ малого бізнесу до фінансування. Обґрунтовано роль Поліського центру цифрових інновацій (POLIDIH) як платформи цифрової трансформації сільських територій, що на основі геоінформаційних і супутникових даних підвищує прозорість управління та інвестиційну привабливість громад, сприяючи розвитку смарт-спеціалізацій і підтримці малого бізнесу. Ключовим інструментом визначено геоінвестиційний паспорт громади, який перетворює територію на зрозумілий і порівнюваний для інвестора об'єкт та виступає елементом єдиної інвестиційної екосистеми. Зроблено висновок, що сталий розвиток малого бізнесу можливий лише за умови формування інтегрованої цифрової та управлінської екосистеми на рівні громад.

7.1. Digitalization of local communities as a tool for overcoming investment barriers to small business development

Analysis shows that attracting investment to territorial communities is essential for development but faces major barriers. Many communities lack qualified staff, including project managers, economists, and IT specialists, and have little experience in preparing investment proposals or working with donor programmes. Weak coordination between local departments further reduces the quality of project applications, leading to low success in obtaining funding.

The local investment climate is also constrained by bureaucracy, overregulation, and legal uncertainty. Complicated land allocation, construction permits, and grid connections, together with the absence of up-to-date spatial planning documents, significantly increase investor risk. Unclear property rights, corruption risks, and frequent regulatory changes undermine trust and discourage both domestic and foreign investors.

Financial capacity is another major limitation. Most communities rely on agricultural taxes and subsidies, which are insufficient for large-scale projects. Although borrowing instruments exist, only a small share of communities use them, forcing most to depend on state transfers, grants, or private investors. However, competition for these resources is high, and many communities lack professionally prepared feasibility studies to attract funding. Limited access to credit for local businesses further constrains entrepreneurship.

Russia's war has sharply reduced investment attractiveness, particularly in rural and frontline regions. Military risks, occupation, and infrastructure damage make many areas unsuitable for investment, while even safer regions require war-

risk insurance and state guarantees. Additional concerns over corruption and weak law enforcement further increase perceived risk.

Finally, human capital constraints remain critical. Rural areas lack skilled workers, entrepreneurial leaders, and English-speaking professionals able to support investors. Youth outmigration and weak education systems reduce the local talent pool, forcing investors to import labour at higher cost. Despite these challenges, communities remain motivated, and investments in human capital, governance capacity, and coordinated development strategies are essential to break the cycle of low investment and underdevelopment.

POLIDIH stands as a transformative platform designed to foster the exchange and utilization of geospatial information across diverse sectors within the Polissia region of Ukraine.[111;112] This initiative aims to catalyze the development of smart specializations tailored to the unique strengths of each area: from the Zhytomyr region's focus on the production of concrete, gypsum, and sand products, and organic farming, to the Chernihiv region's emphasis on enhancing the quality and processing of agricultural raw materials, alongside the development of green technologies, bioeconomy, and information technologies. Furthermore, it seeks to bolster Volyn's environmentally friendly food production, Rivne's high-tech organic agriculture, berry growing, and horticulture, and the IT sector, as well as Kyiv's

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[111] *Pyvovar, P. (2025). POLIDIH – Empowering the digital future: Digital solutions and services for the agricultural sector. Oral presentation at the DigiAgrar_UA Workshop «Digital Transformation for Sustainable Development: German-Ukrainian Perspectives for Future Agricultural and Food Systems in Europe», 10–12 November 2025, Leibniz Institute of Agricultural Development in Transition Economies (IAMO), Halle (Saale), Germany.*

[112] *POLIDIH – Polissia Digital Innovation Hub. n.d. POLIDIH Website. POLIDIH. Accessed January 13, 2026. http://polidih.com.ua/.*

innovative food product manufacturing.

POLIDIH offers integrated use of geographic information systems (GIS) and technologies to promote sustainable development, optimize natural resource management, and increase the investment attractiveness of communities.[113;114] These services will allow territorial communities not only to effectively manage their resources and plan the development of their territories, but also to increase transparency and openness in their interaction with citizens, ensure sustainable use of natural resources, and improve the environmental situation and quality of life of their residents. The heightened investment attractiveness will significantly increase the likelihood of implementing S3 domains (Fig. 7.1.1).

The outcomes of EDIH supporting S3 domains can be seamlessly integrated into the S3 platform, enriching it with valuable data and insights. This integration facilitates collaboration, knowledge-sharing, and synergy among stakeholders, enhancing the platform's functionality as a dynamic tool for policy-makers and businesses for real-time monitoring of digital innovation trends, enabling evidence-based decision-making and alignment with regional development goals.[115]

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[113] *POLIDIH – Polissia Digital Innovation Hub. n.d. POLIDIH Website. POLIDIH. Accessed January 13, 2026. http://polidih.com.ua/.*

[114] *Rozhkov, O. (2025). Digital transformation in Ukraine's crops and livestock sectors: Determinants and implications. Oral presentation at the DigiAgrar_UA Workshop «Digital Transformation for Sustainable Development: German-Ukrainian Perspectives for Future Agricultural and Food Systems in Europe», 10–12 November 2025, Leibniz Institute of Agricultural Development in Transition Economies (IAMO), Halle (Saale), Germany.*

[115] *European Digital Innovation Hubs Network. n.d. Information for Companies. European Digital Innovation Hubs Network. Accessed January 13, 2026. https://surl.li/raghft*

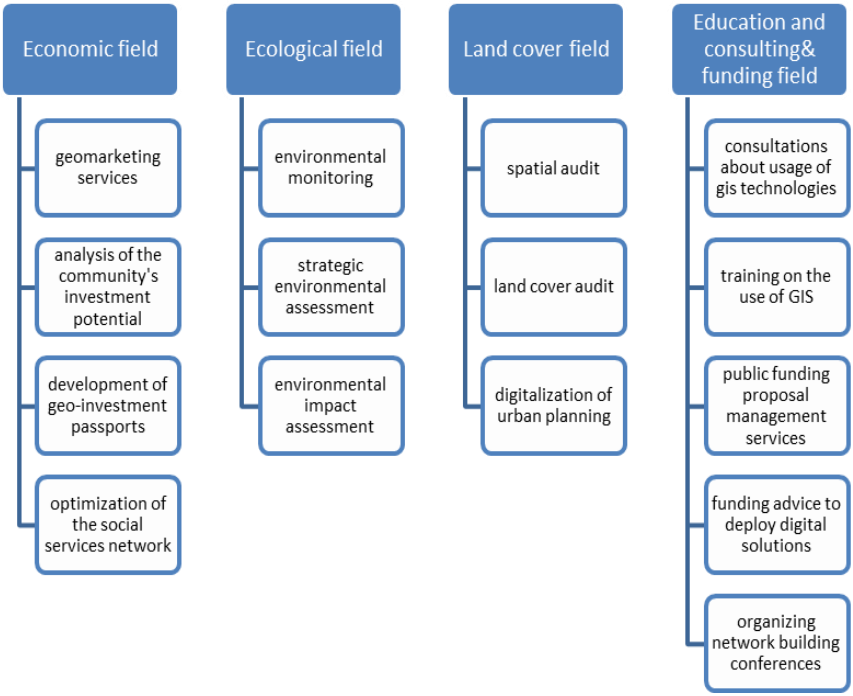

Figure 7.1.1. Services of POLIDIH divided by type

The EDIH will serve as a bridge between public administrations and companies providing e-government technologies; maintain structured long-term relationships with relevant local actors such as regional authorities, industrial clusters, SME associations, etc; offer seamless service with European Enterprise Network (EEN) and Startup Europe, including joint events, common trainings, and workshops; act as an interface with the European Commission to support the implementation of specific sectorial policies, SME policies, and eGovernment policies.[116]

[116] *Skydan, O. V., Pyvovar, P. V., Tarasovych, L. V., et al. (2022). Geoinformation technologies in managing rural economy development. Zhytomyr: Polissia National University.*

7.2. Community geo-investment passport – the main tool for attracting investment in small business development

The community geo-investment passport is considered a key tool for attracting investment in territorial communities, as it allows you to translate an abstract idea of the territory into a clear, structured and evidence-based model of its investment potential. In response to the systemic challenges of the development of rural areas, the Polissya Digital Innovation Hub has developed a unique service «Community Geo-Information Passport», aimed at making the community understandable, transparent and comparable for internal and external investors. The main idea of this tool is to provide a comprehensive representation of the community through a combination of spatial data, socio-economic indicators, infrastructure information and characteristics of natural resources, which allows the investor to quickly assess the real possibilities of the territory without the need to conduct expensive and lengthy preliminary research.

The geo-investment passport forms the initial «investment vision» of the community: it gives an idea of its size, land use structure, availability of transport and engineering infrastructure, environmental constraints, human potential and specialization of the economy. Thanks to the spatial format of information presentation, the investor can not only read about the resources, but also see their location, interconnections and constraints, which significantly reduces the level of uncertainty and risk at the early stage of decision-making. This allows comparing different communities with each other, evaluating alternative locations for production or services, and forming a preliminary concept of the investment project even before the start of negotiations.

The «Community Geoinformation Passport» is based on a comprehensive, evidence-based and spatially grounded description of a territorial community. It integrates three key data sources: open public datasets, satellite monitoring, and information provided by the community itself. Open data offer statistical and regulatory context, satellite imagery delivers objective and up-to-date spatial insights, and local inputs clarify actual land use, development plans, constraints, and the availability of investment plots. Together, these sources create a reliable foundation for decision-making rather than just a descriptive profile.

The passport applies a systemic and spatial approach, treating the community as an interconnected socio-economic and environmental system. Data are analysed through maps and geoinformation layers, making visible patterns such as infrastructure access, resource concentration, environmental risks, and development potential. Each indicator is traceable and reproducible, increasing transparency and trust for investors, donors, and public institutions.

A core principle is co-creation with the community. POLIDIH provides analytical and technological expertise, while local stakeholders validate data, refine maps, and define real opportunities and constraints. Continuous cross-checking of satellite data, registers, and local knowledge reduces errors and uncertainty.[117]

The passport is designed as a practical, living tool for investment planning, spatial development, and communication with partners. It is regularly updated and managed under strict

[117] *Ministry of Digital Transformation of Ukraine. n.d. Results of Digital Transformation in the Regions of Ukraine. Ministry of Digital Transformation of Ukraine. Accessed January 13, 2026. https://thedigital.gov.ua/news/technologies/rezultati-tsifrovoi-transformatsii-v-regionakh-ukraini-1.*

ethical and security standards, making it a dynamic component of the community's long-term development and recovery ecosystem.[118]

It is advisable to consider the community geoinvestment passport as an integrated digital tool for spatially oriented investment support, which combines geodata, economic characteristics and institutional parameters of the territory into a single structure that is understandable for the investor, planner and donor. Its construction logic is based on the need to transform the community from an «unknown point on the map» into a transparent object for decision-making, where investment attractiveness is supported by evidence-based data, georeference and clear contacts of responsible persons.[119]

The typical structure of such a passport begins with a spatial-administrative profile: the basic identification characteristics of the community are recorded – the administrative center, the number of settlements, area, population and location relative to regional and national nodes. Next, the geographical and logistical accessibility of the territory is consistently revealed through distances to the capital, regional center, airports, customs points, international highways and border crossings, since it is the transport and logistics context that determines the costs of moving resources and finished products, and therefore the competitiveness of potential projects (Fig. 7.2.1).

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[118] *United Nations Population Division. n.d. Population Division Data Portal. United Nations. Accessed January 13, 2026. https://population.un.org/dataportal/.*

[119] *Skydan, O. V., Pyvovar, P. V., Tarasovych, L. V., et al. (2022). Geoinformation technologies in managing rural economy development. Zhytomyr: Polissia National University.*

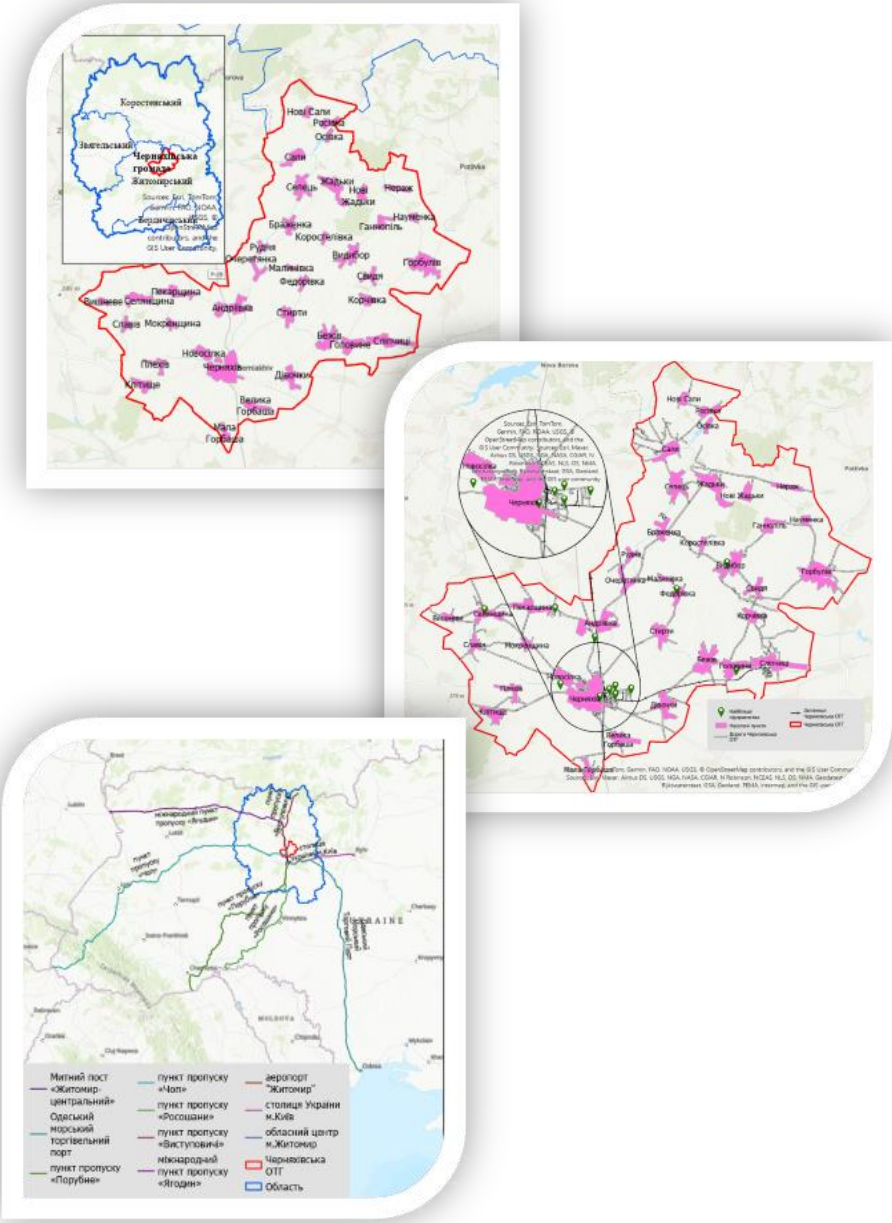

Figure 7.2.1. Geographical component of the investment passport

An important component of the passport is the climatic and agroecological block, which summarizes key parameters of temperature and precipitation, including within the active growing season. For the investor, these data are not only a "weather reference", but primarily input variables for assessing agricultural risks, designing growing technologies, selecting crops and modeling productivity (Fig. 7.2.2).

In parallel, a block of natural resource potential is being formed – the height above sea level, dominant soil types, the share of arable land and forests, as well as the structure of land ownership are described, which is of particular importance in Ukraine due to the difference in institutional regimes for the use of private and communal plots. In POLIDIH practice, these characteristics are transferred to the format of GIS layers, which allow you to quickly compare territories, determine their suitability for various types of investment and build land use scenarios.

A separate «hard» block of the geo-investment passport is the mineral and raw material base, the certification of types of minerals, existing and potential deposits, as well as their industrial use forms the basis for industrial solutions and localization of processing capacities. Along with this, an economic profile of the community is provided – a list of key enterprises, industry specialization and production areas, which allows identifying existing clusters, potential value-added chains and growth points for small and medium-sized businesses. No less indicative is the social and service infrastructure: educational, healthcare, cultural and sports institutions outline the real ability of the territory to retain human capital, accept new employees and provide basic living conditions, without which long-term investments often do not take place. Additionally, the passport usually contains a block of tourism and cultural potential, where local «magnets» and intangible heritage are considered as a resource for economic diversification through the development of rural tourism, creative industries and local brands (Fig. 7.2.3).

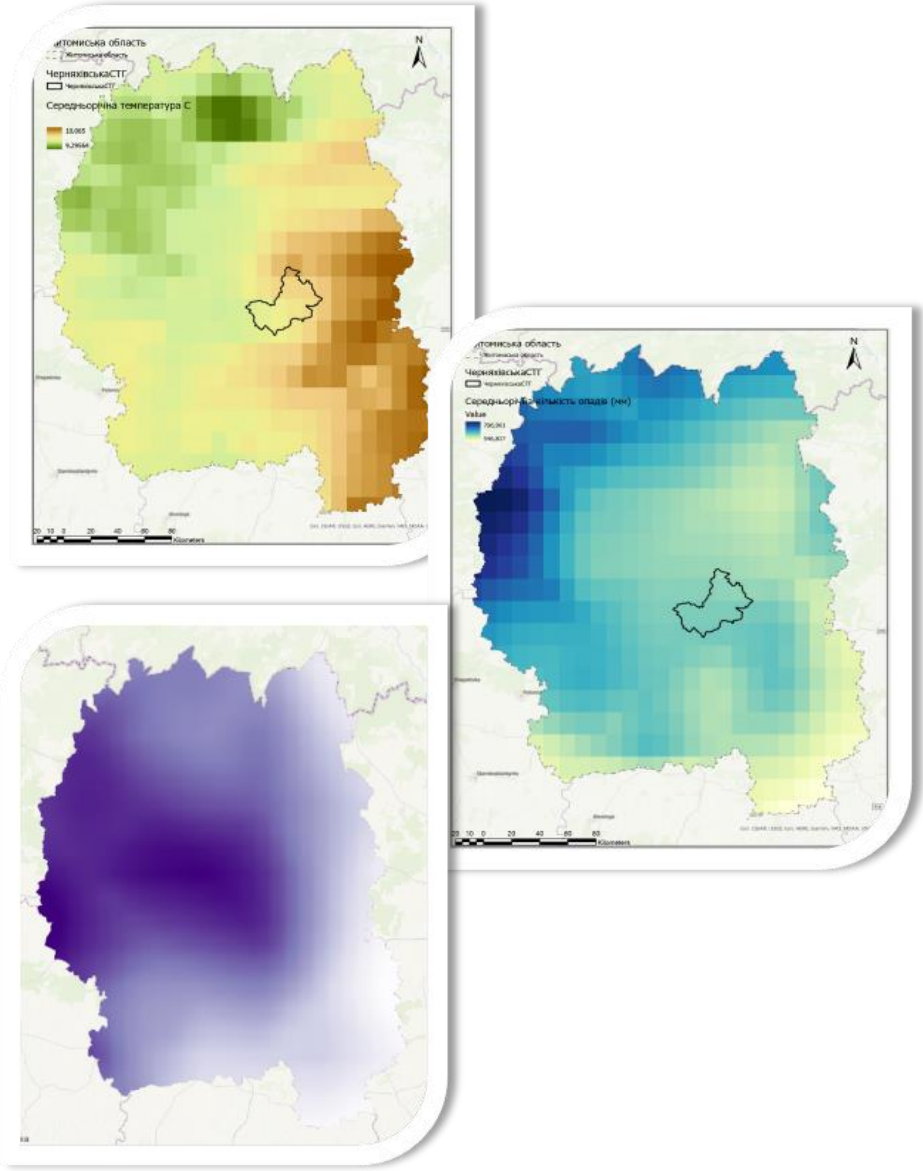

Figure 7.2.2. Environmental component of the investment passport

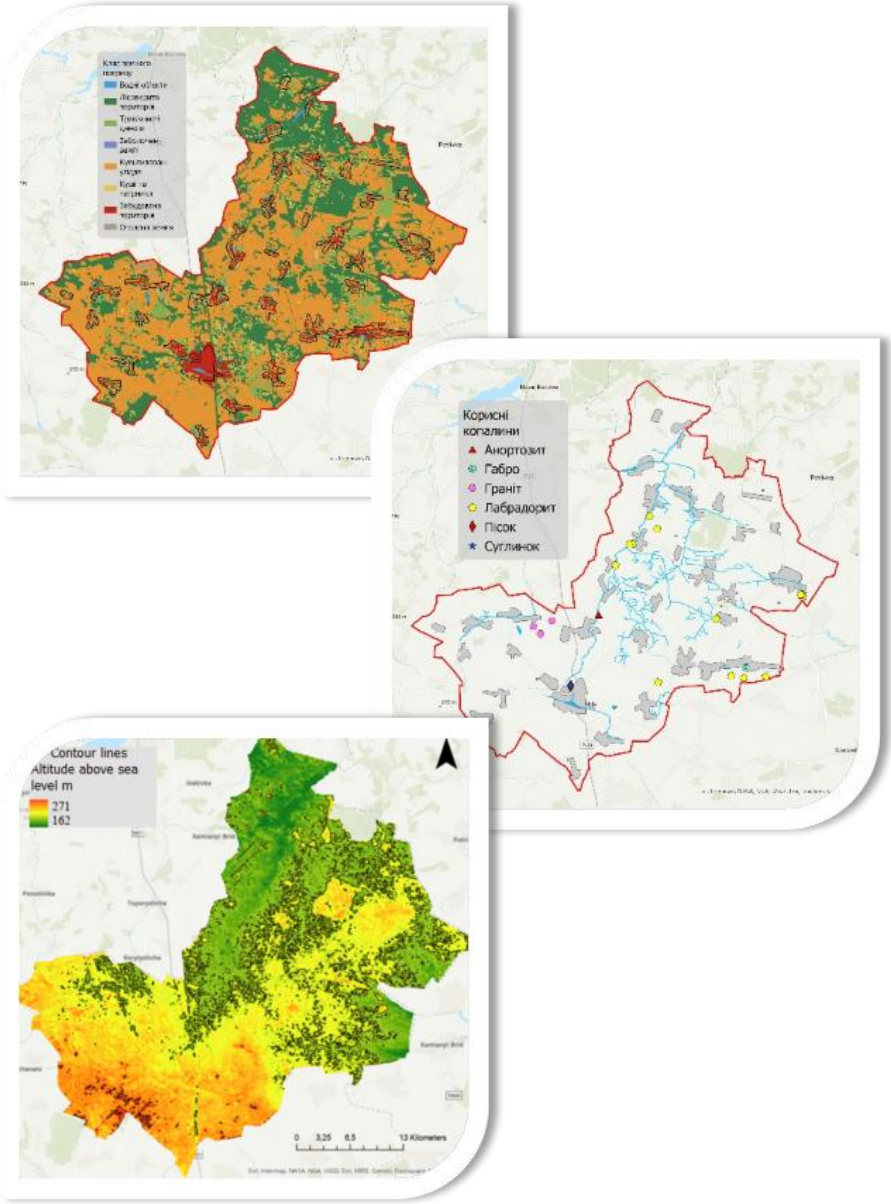

Figure 7.2.3. Resource component of the investment passport

However, the key innovative component of the geo-investment passport in the logic of POLIDIH digital services is an investment catalog of objects with a clear georeference. These are land plots, water bodies, vacant premises and other assets, which are submitted in a standardized format with cadastral parameters, coordinates, form of ownership, engineering accessibility and transfer conditions. It is this block that turns the passport from a descriptive document into a practical «market of opportunities», where the investor can assess the location in a spatial context, compare it with infrastructure and risks, and the community can demonstrate the readiness of the offer (Fig. 7.2.4).

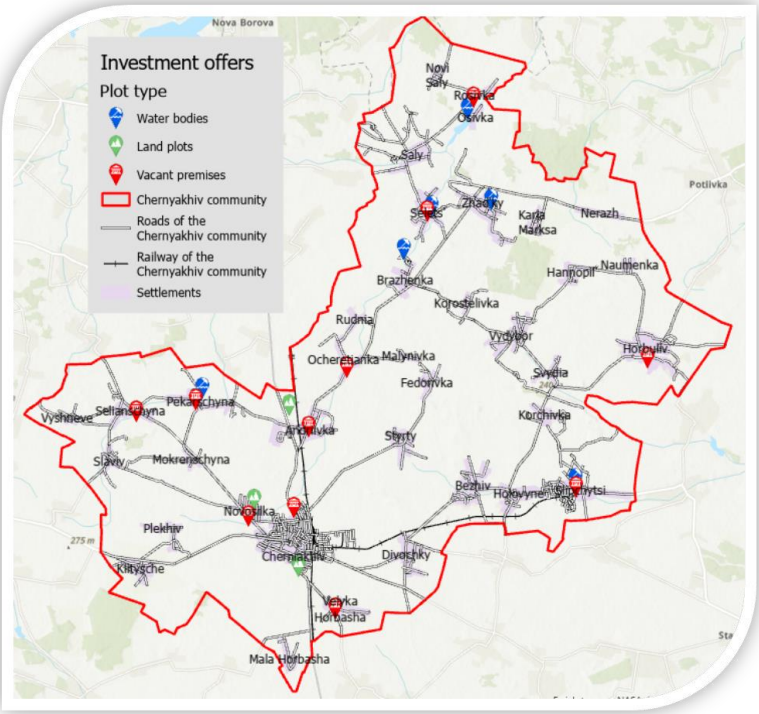

Figure 7.2.4. Community investment proposals based on the example of the Chernyakhiv community

The institutional interface completes the structure, namely, defined responsible units, contact persons and communication channels, which ensure fast communication and reduce the transaction costs of the investor's first entry into the community. Taken together, these components allow us to interpret the geo-investment passport as a «translation» of the territory into the language of data: it makes the community understandable, comparable and visible in the digital environment, and therefore strengthens its ability to compete for investment resources and integrate into recovery and development programs at the national and European levels.

7.3. Challenges of managing small business development in communities: transition to a unified ecosystem

Developing a geo-investment passport is not merely a technical task but a test of a community's institutional capacity for economic development. In practice, the main barriers to investment are not the lack of land or natural resources, but weak governance, poor organization, and fragmented information systems that fail to convert these assets into economic value.

In most communities, investor relations formally exist but are institutionally weak. Investment units are typically understaffed and lack professional expertise, reducing their work to reactive and superficial actions. A geo-investment passport, however, requires systematic data collection, spatial analysis, and an understanding of business and risk. Without a professional investment core, the passport becomes a symbolic document rather than a real investment tool.

Low political commitment further limits its impact. Many local leaders still operate in a maintenance-oriented mindset

rather than a development-driven one, treating investment as risky or secondary. As a result, geo-investment passports are rarely integrated into zoning, infrastructure planning, or negotiations with business.Another major barrier is the lack of reliable spatial and asset data. Communities often have no complete land registers, infrastructure maps, or legally cleared investment plots. Unclear cadastral status, missing zoning, and legal restrictions create high transaction costs for investors and undermine trust.

Ultimately, these problems reflect the absence of a coherent investment ecosystem. A geo-investment passport can only be effective when supported by political leadership, professional investment teams, digital data systems, and legally prepared sites. Without this ecosystem, even the best passport remains only a visual representation of unrealized potential.

CONCLUSIONS

Based on the results of the study presented in the monograph, the following main conclusions were drawn:

1. The evolution of strategic small business management concepts from budget planning to integrated SMART models is driven by the growing turbulence of the external environment, the digitalization of the economy, and the need for rapid adaptation to change. For small businesses, SMART management is not only a modern management tool, but also a strategic condition for increasing competitiveness, sustainability, and realizing development potential in the context of military and post-war transformations in Ukraine.

2. SMART management is a qualitatively new management paradigm based on the synergy of data-driven approaches, digital technologies, and human-centeredness. Its key characteristics are proactivity, adaptability, integration of management functions, and a focus on forecasting and real-time management. Unlike traditional hierarchical models, SMART management provides a transition from reactive decisions to strategic management based on analytics, flexible organizational structures, and the development of management competencies.

3. The integration of marketing communications, logistics, and digital technologies is a key theoretical and methodological principle of SMART management for small businesses. The concepts of omnichannel and customer experience management form the basis for building end-to-end business processes and a unified information space in which digital technologies act as the “integration core.” This approach allows logistics to be transformed from a support function into a component of value proposition, and marketing communications into a demand management tool, ensuring synergy and sustainable development of small businesses.

4. Digital transformation is a determining factor in the development of small businesses in the digital economy, creating new opportunities to increase the productivity, flexibility, and market adaptability of enterprises. At the same time, it is accompanied by a set of challenges related to limited financial resources, a shortage of digital skills, cyber risks, and the need to revise traditional business models. It has been proven that the effective implementation of digital solutions requires not a fragmented introduction of individual tools, but a systematic strategic approach, coordinated with state support programs and aimed at forming a digital management culture.

5. Marketing in the strategic development system of small businesses is not only a promotion tool, but also a comprehensive management mechanism for adapting enterprises to the turbulent market environment and conditions of the digital economy. The coordinated application of personalized marketing strategies, integrated marketing communications, and multi-channel approaches ensures increased customer focus, more efficient use of limited resources, and the formation of sustainable competitive advantages.

6. Branding and customer loyalty management are key strategic drivers of long-term development for small businesses in the digital environment. Building a strong brand based on a clear identity, emotional value, and consumer trust, combined with systematic customer relationship management, contributes to increased customer loyalty, stable demand, and improved business viability.

7. It has been proven that logistics management is a system-forming element of strategic development of small businesses, which directly affects their competitiveness, financial stability, and ability to adapt to an unstable external environment. Coordinated management of logistics processes, optimization of supply chains, and rationalization of logistics costs ensure

increased operational efficiency of small enterprises and logically emphasize the role of marketing and customer focus in shaping market advantages.

8. The implementation of digital solutions in logistics management and the use of logistics outsourcing are effective tools for improving the efficiency of small enterprises in conditions of limited resources and growing risks. Focusing on key activities, reducing total logistics costs, and improving service quality contribute to the formation of adaptive logistics strategies, which, together with marketing and management tools, create a comprehensive framework for the sustainable development of small businesses.

9. The innovative SMART management model for small businesses forms a comprehensive, adaptive, and scientifically verified strategic management architecture that ensures the transition from fragmented and reactive management decisions to proactive, data-driven management in the context of digital transformation and growing external turbulence. The integration of the conceptual foundations of SMART management with SMART industry models, business networks, and SMART specialization mechanisms creates a methodological basis for improving management consistency, digital maturity, and innovative capacity of small enterprises, logically complementing the results of previous sections on the role of marketing, logistics, and digital technologies in shaping competitive advantages.

10. The use of digital technologies, information and analytical systems, and smart dashboards within the proposed SMART management model ensures transparency, measurability, and strategic controllability of small business processes. The proposed methodology for forming a composite SMART management index allows for a comprehensive quantitative assessment of the level of managerial and digital maturity of enterprises, identification of strategic gaps, and determination of

priority areas for innovative development. Together, this creates a scientifically sound basis for improving the competitiveness, sustainability, and long-term sustainable development of small businesses.

11. Effective implementation of the SMART management model in small businesses is possible provided that comprehensive organizational and economic prerequisites are in place, including transformation of the management structure, development of digital competencies among staff, development of modern IT infrastructure, and formation of an innovation-oriented corporate culture. The practical implementation of SMART approaches ensures cost optimization, increased transparency and manageability of business processes, growth in financial stability and management efficiency, which logically continues the results of the previous section on the methodological and instrumental integrity of the proposed model.

12. The implementation of SMART management creates strategic prerequisites for increasing the flexibility, adaptability, and competitiveness of small enterprises in the long term. The expected results of the model's implementation are manifested in increased operational efficiency, enhanced customer focus, development of innovative potential, and integration of small businesses into modern digital and business ecosystems. The outlined prospects for the development of SMART management in Ukraine, taking into account global technological trends and European integration processes, confirm its role as a key tool for the sustainable development of small businesses and the recovery of the national economy.

13. The digitization of local communities is a key factor in overcoming investment barriers to small business development in conditions of resource constraints and post-war challenges. The introduction of digital management services, in particular based

on geoinformation and satellite data, ensures greater transparency of management processes, reduces information asymmetry and risks for investors, and facilitates the formation of informed decisions on the spatial and economic development of communities. The activities of the Polissya Center for Digital Innovation (POLIDIH) prove the effectiveness of integrating digital tools, smart specializations, and small business support within a single regional innovation ecosystem.

14. The community's geo-investment passport is a key tool for managing digital services to support small businesses, transforming the territorial community into an understandable, comparable, and investment-attractive entity. Its effectiveness is determined not only by the quality of digital data, but also by the level of institutional capacity of the community, the availability of professional management teams, and the integration of the passport into a broader management and investment ecosystem. The formation of such an ecosystem ensures the coordination of spatial planning, economic policy, and business support, which is a necessary prerequisite for the sustainable development of small businesses and increasing the competitiveness of territorial communities at the national and European levels.

Thus, summarizing the results of the study, it should be noted that the strategic development of small businesses in the current conditions of digitalization and increased competition is impossible without the comprehensive use of marketing tools, digital services, and a systematic approach to the management of local communities. The analyzed theoretical and methodological foundations, modern practices of management, marketing, logistics, digital support platforms, and mechanisms for forming investment attractiveness indicate a close relationship between increasing the competitiveness of small enterprises and the development of integrated digital and management ecosystems

at the local level. The results confirm the need to combine personalized marketing strategies, multi-channel communication, branding, and the effective use of geoinformation services to ensure the sustainable and balanced development of small businesses in the context of dynamic economic, social, and technological changes.

ВИСНОВКИ

За результатами дослідження, представленого в монографії, зроблено такі основні висновки:

1. Еволюція концепцій стратегічного управління малим бізнесом від бюджетного планування до інтегрованих SMART-моделей зумовлена зростанням турбулентності зовнішнього середовища, цифровізацією економіки та необхідністю швидкої адаптації до змін. Для малого бізнесу SMART-менеджмент виступає не лише сучасним управлінським інструментом, а й стратегічною умовою підвищення конкурентоспроможності, стійкості та реалізації потенціалу розвитку в умовах воєнних і післявоєнних трансформацій в Україні.

2. SMART-менеджмент є якісно новою управлінською парадигмою, яка базується на синергії data-driven підходів, цифрових технологій та людиноцентричності. Його ключовими характеристиками є проактивність, адаптивність, інтегрованість управлінських функцій, орієнтація на прогнозування та управління в режимі реального часу. На відміну від традиційних ієрархічних моделей, SMART-менеджмент забезпечує перехід від реактивних рішень до стратегічного управління, заснованого на аналітиці, гнучких організаційних структурах і розвитку управлінських компетентностей.

3. Інтеграція маркетингових комунікацій, логістики та цифрових технологій є ключовим теоретико-методологічним принципом SMART-менеджменту малого бізнесу. Концепції омніканальності та управління клієнтським досвідом формують основу для побудови наскрізних бізнес-процесів і єдиного інформаційного простору, в якому цифрові технології виступають «інтеграційним ядром». Такий підхід дозволяє трансформувати логістику з допоміжної функції у складову

ціннісної пропозиції, а маркетингові комунікації – в інструмент управління попитом, що забезпечує синергетичний ефект та сталий розвиток малих підприємств.

4. Цифрова трансформація є визначальним чинником розвитку малого бізнесу в умовах платформної економіки, формуючи нові можливості підвищення продуктивності, гнучкості та ринкової адаптивності підприємств. Водночас вона супроводжується комплексом викликів, пов'язаних із обмеженістю фінансових ресурсів, дефіцитом цифрових компетентностей, кіберризиками та необхідністю перегляду традиційних бізнес-моделей. Доведено, що ефективна реалізація цифрових рішень потребує не фрагментарного впровадження окремих інструментів, а системного стратегічного підходу, узгодженого з державними програмами підтримки та спрямованого на формування цифрової культури управління.

5. Маркетинг у системі стратегічного розвитку малого бізнесу виступає не лише інструментом просування, а комплексним управлінським механізмом адаптації підприємств до турбулентного ринкового середовища та умов цифрової економіки. Узгоджене застосування персоналізованих маркетингових стратегій, інтегрованих маркетингових комунікацій і мультиканальних підходів забезпечує підвищення клієнтоорієнтованості, ефективніше використання обмежених ресурсів та формування стійких конкурентних переваг.

6. Брендинг і управління лояльністю клієнтів є ключовими стратегічними драйверами довгострокового розвитку малих підприємств у цифровому середовищі. Формування сильного бренду, заснованого на чіткій ідентичності, емоційній цінності та довірі споживачів, у поєднанні з системним управлінням взаємовідносинами з

клієнтами сприяє зростанню їх прихильності, стабілізації попиту та підвищенню життєздатності бізнесу.

7. Доведено, що логістичний менеджмент є системоутворювальним елементом стратегічного розвитку малого бізнесу, який безпосередньо впливає на рівень його конкурентоспроможності, фінансову стійкість та здатність адаптуватися до нестабільного зовнішнього середовища. Узгоджене управління логістичними процесами, оптимізація ланцюгів постачання та раціоналізація логістичних витрат забезпечують підвищення операційної ефективності малих підприємств і логічно підкреслюють роль маркетингу та клієнтоорієнтованості у формуванні ринкових переваг.

8. Впровадження цифрових рішень у логістичному менеджменті та використання логістичного аутсорсингу є дієвими інструментами підвищення ефективності діяльності малих підприємств за умов обмежених ресурсів і зростання ризиків. Концентрація на ключових видах діяльності, зниження сукупних логістичних витрат і підвищення якості сервісу сприяють формуванню адаптивних логістичних стратегій, які разом із маркетинговими та управлінськими інструментами створюють цілісну основу сталого розвитку малого бізнесу.

9. Розроблена інноваційна модель SMART-менеджменту малого бізнесу формує цілісну, адаптивну та науково верифіковану архітектуру стратегічного управління, яка забезпечує перехід від фрагментарних і реактивних управлінських рішень до проактивного, data-driven управління в умовах цифрової трансформації та зростаючої турбулентності зовнішнього середовища. Інтеграція концептуальних засад SMART-менеджменту з моделями SMART-індустрії, бізнес-мережами та механізмами SMART-спеціалізації створює методологічну основу для підвищення управлінської узгодженості, цифрової зрілості та інноваційної

спроможності малих підприємств, логічно доповнюючи результати попередніх розділів щодо ролі маркетингу, логістики та цифрових технологій у формуванні конкурентних переваг.

10. Використання цифрових технологій, інформаційно-аналітичних систем і смарт-дашбордів у межах запропонованої моделі SMART-менеджменту забезпечує прозорість, вимірюваність і стратегічну керованість бізнес-процесів малого бізнесу. Запропонована методика формування композитного індексу SMART-менеджменту дозволяє здійснювати комплексну кількісну оцінку рівня управлінської та цифрової зрілості підприємств, ідентифікувати стратегічні розриви та визначати пріоритетні напрями інноваційного розвитку. У сукупності це створює науково обґрунтоване підґрунтя для підвищення конкурентоспроможності, стійкості та довгострокового сталого розвитку малого бізнесу.

11. Ефективне впровадження моделі SMART-менеджменту в малому бізнесі можливе за умови формування відповідних організаційно-економічних передумов, які охоплюють трансформацію управлінської структури, розвиток цифрових компетенцій персоналу, розбудову сучасної IT-інфраструктури та формування інноваційно орієнтованої корпоративної культури. Практична реалізація SMART-підходів забезпечує оптимізацію витрат, підвищення прозорості та керованості бізнес-процесів, зростання фінансової стійкості й управлінської ефективності, що логічно продовжує результати попереднього розділу щодо методологічної та інструментальної цілісності запропонованої моделі.

12. Впровадження SMART-менеджменту створює стратегічні передумови для підвищення гнучкості, адаптивності та конкурентоспроможності малих підприємств у

довгостроковій перспективі. Очікувані результати реалізації моделі проявляються у зростанні операційної ефективності, посиленні клієнтоорієнтованості, розвитку інноваційного потенціалу та інтеграції малого бізнесу в сучасні цифрові й бізнес-екосистеми. Окреслені перспективи розвитку SMART-менеджменту в Україні, з урахуванням глобальних технологічних трендів і євроінтеграційних процесів, підтверджують його роль як ключового інструменту сталого розвитку малого підприємництва та відновлення національної економіки.

13. Цифровізація територіальних громад виступає системоутворюючим чинником подолання інвестиційних бар'єрів розвитку малого бізнесу в умовах ресурсних обмежень та післявоєнних викликів. Запровадження цифрових сервісів управління, зокрема на базі геоінформаційних і супутникових даних, забезпечує підвищення прозорості управлінських процесів, зниження інформаційної асиметрії та ризиків для інвесторів, а також формування обґрунтованих рішень щодо просторового й економічного розвитку громад. Діяльність Поліського центру цифрових інновацій (POLIDIH) доводить ефективність інтеграції цифрових інструментів, smart-спеціалізацій і підтримки малого бізнесу в межах єдиної регіональної інноваційної екосистеми.

14. Геоінвестиційний паспорт громади є ключовим інструментом менеджменту цифрових сервісів підтримки малого бізнесу, який трансформує територіальну громаду в зрозумілий, порівнюваний та інвестиційно привабливий об'єкт. Його ефективність визначається не лише якістю цифрових даних, а й рівнем інституційної спроможності громади, наявністю професійних управлінських команд та інтеграцією паспорта в ширшу управлінську й інвестиційну екосистему. Формування такої екосистеми забезпечує

узгодженість просторового планування, економічної політики та підтримки підприємництва, що є необхідною передумовою сталого розвитку малого бізнесу й підвищення конкурентоспроможності територіальних громад у національному та європейському вимірах.

Таким чином, узагальнюючи результати проведеного дослідження, слід констатувати, що стратегічний розвиток малого бізнесу в сучасних умовах цифровізації та підвищеної конкуренції неможливий без комплексного застосування маркетингових інструментів, цифрових сервісів і системного підходу до управління територіальними громадами. Проаналізовані теоретико-методичні засади, сучасні практики менеджменту, маркетингу, логістики, цифрові платформи підтримки та механізми формування інвестиційної привабливості свідчать про тісний взаємозв'язок між підвищенням конкурентоспроможності малих підприємств і розвитком інтегрованих цифрових та управлінських екосистем на локальному рівні. Отримані результати підтверджують необхідність поєднання персоналізованих маркетингових стратегій, багатоканальної комунікації, брендингу та ефективного використання геоінформаційних сервісів для забезпечення сталого та збалансованого розвитку малого бізнесу в умовах динамічних економічних, соціальних та технологічних змін.

НАУКОВЕ ВИДАННЯ

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SMART Management of Small Businesses:
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SMART-менеджмент малого бізнесу:
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