

# A BUSINESS-FIRST APPROACH TO GENDER INCLUSION:

How to Think About Gender  
Inclusion in Small and  
Medium Enterprise  
Operations

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Shell Foundation | 

# TABLE OF CONTENTS



# PART I - A business-first, holistic approach to gender inclusion: an overview of what we did, learnings and results

- 02**      **A business-first and holistic approach to gender inclusion**
- 03**      **What we saw: a teaser**
- 04**      **The foundations of this approach**
- 06**      **Designing the approach**
  - Roadmap: applying a gender lens to common business challenges
- 10**      **Activities, results and key learnings to date**
  - Snapshot of strategies tested and pilot impacts
  - Lessons Learned

# PART II - The tools tested: a closer look at the activities, the results and next steps

- 16**      **The tools tested and the results: A closer look**
  - Tool 1: Sales
  - Tool 2: Marketing
  - Tool 3: Market Research
  - Tool 4: Customer Care
  - Tool 5: Hiring and Retention of Sales Teams
- 36**      **Sex-disaggregated data: The place to start**
- 40**      **Taking this work forward**
- 41**      **Conclusion**

# A BUSINESS-FIRST AND HOLISTIC APPROACH TO GENDER INCLUSION

Businesses and investors operating in the clean energy sector have both an opportunity and a role to play in gender inclusion. As interest in growing the number of women in leadership and entrepreneurial roles increases, there is a clear opportunity to help small and medium enterprises (SMEs) think about how to strategically leverage gender insights in areas such as sales, marketing, market research and customer care.

In 2016, the Peterson Institute for International Economics released a cross-industry study analysing results from 21,980 publicly traded companies in 91 countries demonstrating that companies with 30% women in their leadership compositions added 6% to net profit margin.<sup>2</sup> Another study by Credit Suisse Research found that companies with at least one woman director had better share price performances than those companies without women in directorship roles.<sup>3</sup>

Despite this emerging evidence documenting the business benefits of including women, gender inclusion efforts and evidence at the SME level remain scarce. While many businesses are motivated to adopt an inclusive approach, they often overlook the potential of how a gender-inclusive lens can help them enhance their internal operational performance, increase market share and grow the demand for their products and services. Other businesses may see the benefits of adopting gender-inclusive strategies, and may be keen to increase their impact on women, but lack the know-how and the technical support required to put this motivation into action.

By investing in gender inclusion, businesses can generate opportunities for women while also furthering their business objectives. In recognition of the opportunities outlined above, the Shell Foundation and Value for Women embarked on a partnership in 2016 designed to pilot a holistic framework for gender inclusion in enterprise operations, using a “bottom-up”, business-first approach, aimed at testing the impact of gender inclusion on business performance. The approach first hones in on business challenges, and then designs practical, measurable solutions with a gender lens.

## PART I

<sup>1</sup>Catalyst (2017). Women on Corporate Boards Globally. Retrieved from: <http://www.catalyst.org/knowledge/women-corporate-boards-globally>

<sup>2</sup>Noland, M., Moran, T. and Kotschwar, B. (2016). Is Gender Diversity Profitable? Evidence from a Global Survey. Working Paper. Peterson Institute for International Economics. Retrieved from: <https://piie.com/publications/working-papers/gender-diversity-profitable-evidence-global-survey>

<sup>3</sup>Credit Suisse Research Institute (2016). The CS Gender 3000: Women in Senior Management. Retrieved from: <https://glg.it/assets/docs/csri-gender-3000.pdf>



**T**he Shell Foundation and Value for Women are building and testing a business-first, holistic approach for piloting gender inclusion across SME operations and clean energy value chains. Strategies designed and tested to date focus on addressing business challenges using gender-focused solutions.

The approach seeks to build evidence for improved performance and efficiencies in SME operations, to make the case for impact on the lives of women, and to help businesses tap into better market share, maximise their competitive edge and leverage investment.

**The rapidly-growing clean energy sector represents an important opportunity for businesses and for women. This paper outlines one peice of the gender and energy nexus, from the perspective of SMEs who are keen to think about gender in new ways**

## WHAT WE SAW: A TEASER

We piloted a holistic, business-first approach to design and test 13 customised gender inclusion strategies across key business areas, together with five Shell Foundation partners. The pilot found evidence of positive financial returns as well as the potential for long-term, scalable impact.

These include:

**A 33%  
reduction**

in **technical support calls** from clients handled by call centre agents after applying gender-specific messaging to customer service calls

**An increase  
in sales of 85%**

after testing the impact of training women direct sales agents **to sell in strategic sales locations**

**An increase  
in sales of 73%**

after testing the impact of training women direct sales agents **to sell using demonstration kits in public areas**

# THE FOUNDATION OF THIS APPROACH

**The business solutions were designed to improve efficiencies, while also leading to positive outcomes on women, and on businesses' ability to leverage additional investment, to capture their full market share and to maximise their operational performance.**

The following three core components formed the foundation of this work:

## **There is a clear business case for pursuing gender inclusion:**

Activities focused on gender inclusion across a business model can lead to positive impacts on business performance, including increased sales and efficiencies. Evidence of this impact continues to grow. Research has found that companies with at least one woman director had better share price performance and return on equity than those without women board members; moreover, companies with more than one woman on their board outperformed the broader stock market return by up to 3.7% a year as compared to those without female board members.<sup>4</sup> The business case for increasing female leadership within the private sector does not end with a focus on the financial benefits. Studies show that an employee's perception of a company's gender practices can influence performance. For example, a recent Morgan Stanley study found that companies with strong records of gender diversity may be better positioned to succeed "across all drivers of performance", including productivity, decision-making, innovation, customer acquisition and retention, and talent recruitment and retention.<sup>5</sup> However, while there is significant data on the benefits of gender inclusion for large corporations, little information exists on the business impacts of enhancing women's role in the operations of small and medium enterprises.

## **Multiple opportunities exist to positively influence women's lives:**

By enhancing women's employment opportunities within businesses, or by explicitly tapping into the needs and interests of women customers and users in the design and distribution of products and services, businesses can enhance their impact on women while increasing their market share potential. Women sales agents in clean energy enterprises have been found to outperform their male peers, and to be more effective at forming and leveraging relationships in local communities.<sup>6</sup> For instance, a study on male and female entrepreneurs in the cookstove industry found that women outsold men by nearly three times.<sup>7</sup> Adoption of cookstoves by women customers also increased, as businesses considered women customers as a segment, including their needs and preferences in product design and distribution.

## **Businesses can leverage new investment:**

By tapping into gender insights and using a gender intelligence lens, businesses are better positioned to maximise their profit and market share, while also maximising impact. Using gender as a lever demonstrates to investors that the enterprise is tapping into all available ways to understand its market and the needs and desires of its customer segments, and that it is de-risking investment while simultaneously maximising business efficiencies, operations, sales and social impact.



## There is a clear business case for pursuing gender inclusion

The business-first approach builds on a deep understanding of the business' model and its challenges, and designs customised gender strategies focused on solving business challenges with a gender lens. This approach aims to engage businesses by focusing on their needs as the fundamental starting point and appealing to key decision makers in a genuine manner.

The holistic focus includes but goes beyond the typical emphasis on employment and leadership of women, and on human resources practices and policies. **The holistic approach analyses various business processes for gender inclusion opportunities, including market research, product design, value proposition, sales, marketing, customer segmentation and care, and human resources**— and includes a suite of activities within and across these areas.

In order to ensure uptake and relevance of activities to the business, as well as fully informed buy-in across management and staff, hands-on, tailored technical assistance is provided, responding to the business' unique model. **Technical assistance that can support the business-first and bottom-up approach works best**, where experts support the enterprise staff in understanding how gender inclusion relates to their existing business practices.

Five Shell Foundation investee enterprises were selected to participate in the pilot programme, and in co-creating and testing customised strategies across the key business operations areas of market research, sales, marketing and customer care. Each participating business measured the impact of these strategies against a set of Key Performance Indicators (KPIs) established at the outset of the pilot. **The results from the pilot to date indicate that the potential long-term impact of gender inclusion on enterprises' business metrics is significant.** The five partner enterprises operating in East Africa, India and Latin America have business-to-customer models and diverse products, including household energy products, agriculture equipment, and employment and training programmes.

The initial positive results are motivating a second stage for this work. Value for Women and the Shell Foundation will continue to iterate and test these strategies with a wider set of partners in 2018 and 2019.

<sup>4</sup> Zuabi, R. (2015). The Bottom Line: Why Gender Inclusion is Good for Business. Value for Women. Retrieved from: [http://www.v4w.org/images/generales/Resources/BottomLine\\_2015\\_08.pdf](http://www.v4w.org/images/generales/Resources/BottomLine_2015_08.pdf)

<sup>5</sup> Morgan Stanley (2016). Why It Pays to Invest in Gender Diversity. Retrieved from: <http://www.morganstanley.com/ideas/gender-diversity-investment-framework>

<sup>6</sup> Shell Foundation. Building a Sales Force Fit to Travel the 'Last Mile'. Retrieved from: <https://www.shellfoundation.org/Our-News/Features-Archive/Building-a-sales-force-fit-to-travel-the--Last-Mil>

<sup>7</sup> Global Alliance for Clean Cookstoves (2016). 2016 Progress Report for Clean Cooking: Key to Achieving Global Development and Climate Goals. Retrieved from: <http://cleancookstoves.org/resources/reports/2016progress.html>

# DESIGNING THE APPROACH

Developing this approach required commitment and partnership with all participants. This section outlines how the approach was designed, and how it led to the selection of tools to be tested.

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## 1. Self-Assessment for SMEs

Designing the approach began with a self-assessment survey for enterprises interested in participating, in order to determine their interest in adopting gender inclusion strategies into their work, and to scope willingness to co-invest resources in this process.

## 3. Identification of common business challenges

Despite the different sizes, models and locations of each business, a number of common challenges facing these SMEs were identified, including:

- High turnover rate of sales agents/sales team members
- Struggles to consistently meet sales goals
- Lack of sex-disaggregated data on customers or employees
- Mobility constraints faced by women sales agents due to cultural and social norms, limiting their access to the customer base

## 5. Testing the solutions, and measuring changes on business performance

Businesses used the roadmap on the next page (Figure 1) as the basis for selecting gender activities related to their key challenges and areas of interest. The roadmap includes the following categories:

- Common business challenges identified
- Gender lens applied to business challenge
- Suggested solutions using a gender lens
- Strategies tested during pilot
- Expected impact

## 2. Business Diagnostic Assessment

This was followed by a deep diagnostic process to understand each business' model and challenges, and to co-identify opportunities for gender inclusion. These initial assessments helped determine the business areas of focus for creating the gender inclusion strategy. These scoping assessments focused on the following aspects:

- Core challenges currently facing the businesses
- Key obstacles related to sales
- Composition of sales teams (men/women)
- Collection and availability of sex-disaggregated data on business sales, employees and other areas, and how businesses use that data
- Previous experience in gender assessment or analysis, and any gender issues identified by the business
- Motivation for participating, and what the business seeks to achieve for women

## 4. Design of gender solutions for business problems

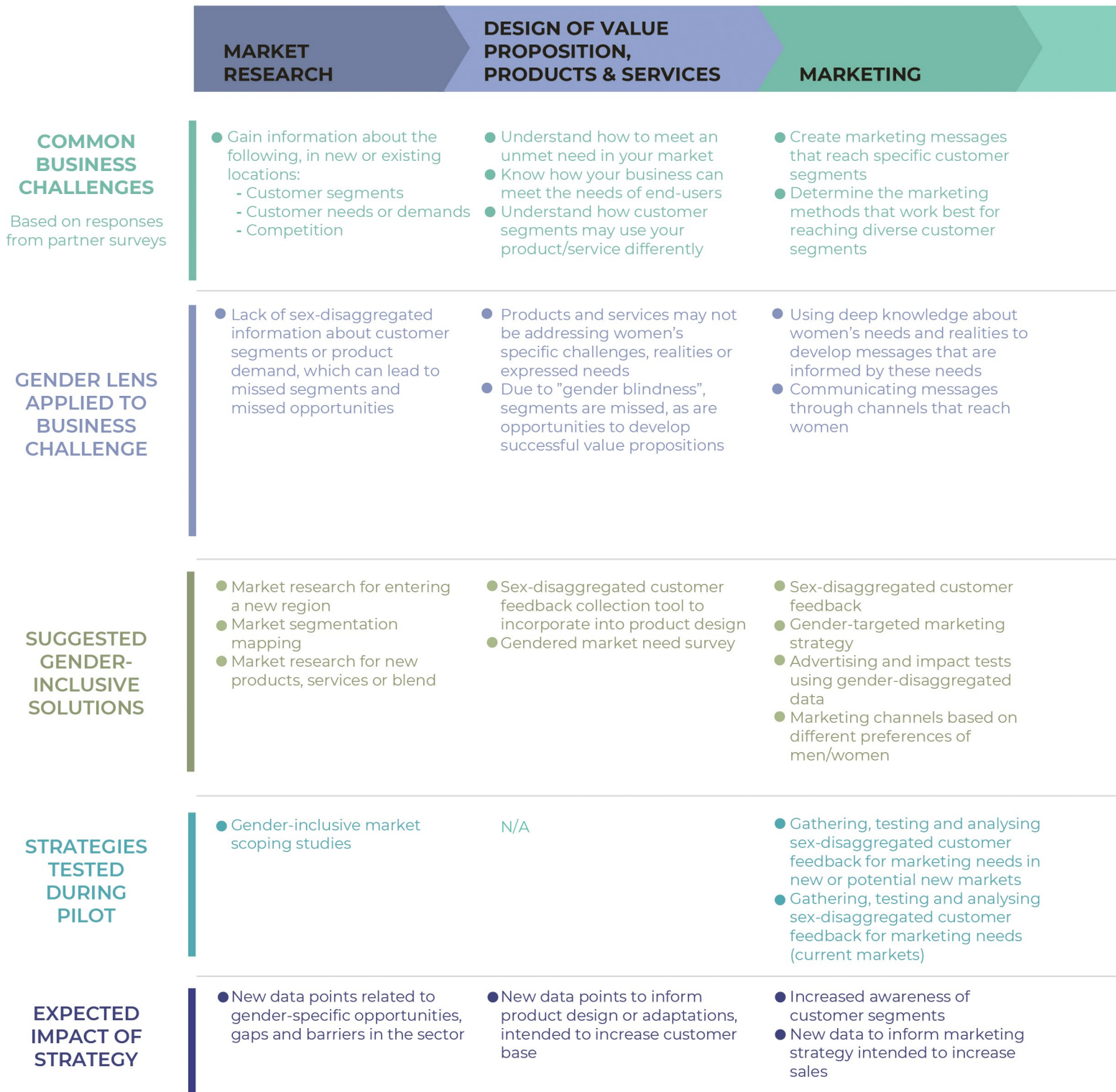
In addition to identifying a few common "gender problems", the analysis also demonstrated how many common business problems can be addressed with new solutions using a gender lens. Thus, the business-first, bottom-up approach was validated early on.

The common challenges identified steered the development of strategies under specific business areas, including sales processes, customer care, sales agent hiring and training, marketing and market research. Other key areas that were identified, but not included due to limitations of time and scope, included human resources and supply chain development.<sup>8</sup>

<sup>8</sup> For the pilot, strategies and activities were chosen with a focus on those thought to deliver results and directional impact within the six-month time frame. They were also selected because little or no data was found about implemented strategies of these types.

# Roadmap: Applying A Gender Lens to Common Business Challenges

Figure 1.





SALES & DISTRIBUTION	CUSTOMER CARE & AFTER SALES	HUMAN RESOURCES	SUPPLY CHAIN
<ul style="list-style-type: none"> <li>● Increase the efficiency of sales strategies</li> <li>● Increase market share (number of customers and number of sales per customer)</li> </ul>	<ul style="list-style-type: none"> <li>● Ensure quality and satisfaction of customer experience</li> <li>● Increase efficiency of customer care strategies</li> <li>● Get care and after-sales support to the end-user</li> </ul>	<ul style="list-style-type: none"> <li>● High turnover rate/low retention of staff (sales agents/customer care agents)</li> <li>● High recruitment costs and accessing the right talent</li> <li>● Lack of HR policies and practices</li> </ul>	<ul style="list-style-type: none"> <li>● Cost effective, quality inputs</li> <li>● Efficient and reliable products and services supporting business/logistics</li> <li>● Identify quality partners that provide sustainable practices/products/services</li> </ul>
<ul style="list-style-type: none"> <li>● Women and men sales staff may face gender-related challenges conducting sales (mobility, time, safety, etc.)</li> <li>● Selling to women and men may require differentiated strategies depending on the context</li> </ul>	<ul style="list-style-type: none"> <li>● Assumptions about who the end-user or purchaser is can cloud businesses' abilities to unpack the needs of men and women end-users and purchasers</li> <li>● Different expectations by end-users based on gender for customer care</li> </ul>	<ul style="list-style-type: none"> <li>● Informal HR policies and management can particularly impact women workers</li> <li>● Missed opportunities to hire and retain talented women due to lack of policies and programmes tailored to the needs of women employees</li> <li>● Cultural beliefs limit ability to access and retain talent</li> </ul>	<ul style="list-style-type: none"> <li>● Women-led businesses and groups of women offering reliable and sustainable supply solutions</li> <li>● Input collection methods disproportionately affect women (i.e., in rural areas where mobility is restricted)</li> <li>● Diversifying the supply chain SMEs can reduce risk/increase opportunities across the value chain and increase opportunities for women</li> </ul>
<ul style="list-style-type: none"> <li>● Enhance efficiencies in upselling process</li> <li>● Enhance efficiencies in sales process for women agents</li> <li>● Gender analysis of sales challenges/solutions</li> <li>● Gendered mapping and analysis for distribution partners</li> <li>● Gender analysis of sales agent performance</li> </ul>	<ul style="list-style-type: none"> <li>● Improving customer care experience for women customers</li> <li>● Analysis of sex-disaggregated data on customer loyalty and trends</li> <li>● Gendered messaging approach to customer needs</li> </ul>	<ul style="list-style-type: none"> <li>● HR policies and programmes that promote gender diversity</li> <li>● Data collection and analysis of employee growth and retention</li> <li>● Training and mentorship programmes for women middle management as SMEs grow</li> <li>● Gender analysis in recruiting of sales teams/agents</li> </ul>	<ul style="list-style-type: none"> <li>● Supply from groups of women</li> <li>● Set up collection sites in communities for inputs</li> <li>● Training for women on quality inputs</li> <li>● Tool for selecting women entrepreneurs as suppliers</li> </ul>
<ul style="list-style-type: none"> <li>● Providing supplemental capital for sales agents</li> <li>● Mapping strategic sales locations and training agents in group sales techniques</li> <li>● Developing gender-specific communications during the upsell process</li> </ul>	<ul style="list-style-type: none"> <li>● Gender-specific messaging on customer education calls</li> </ul>	<ul style="list-style-type: none"> <li>● Hiring and retention of sales teams</li> </ul>	<p>N/A</p>
<ul style="list-style-type: none"> <li>● Increased sales to wider or more targeted customer base</li> <li>● Increase or adapted sales strategy based on gender awareness</li> </ul>	<ul style="list-style-type: none"> <li>● Increased customer engagement leading to increased sales or increased repeated customers</li> <li>● Cost savings in customer care time per customer</li> </ul>	<ul style="list-style-type: none"> <li>● Increased rates of employee satisfaction and retention</li> <li>● Cost savings in recruitment</li> </ul>	<ul style="list-style-type: none"> <li>● Increased quality of partner outputs</li> <li>● Cost/time savings from increased partner efficiencies</li> </ul>

# **ACTIVITIES, RESULTS AND KEY LEARNINGS TO DATE**



# T

his section highlights the strategies developed and implemented, key results, and important lessons learned which will shape this work going forward.

## 13 ACTIVITIES OR “TOOLS” WERE IMPLEMENTED

by the five participating enterprises, of which:

### 6 TOOLS RETURNED POSITIVE RESULTS

Six returned definitive, positive results **on business performance**

### 3 TOOLS WERE DIRECTIONALLY POSITIVE

Three returned directionally positive results, with **indications that with more time and slight iterations, business performance impacts would be seen**

### 4 TOOLS WERE NOT SIGNIFICANT

Four did not return significant results and/or did **not demonstrate an impact on the business.**

The activities implemented reflect the collaborative process undertaken to develop customised tools to address each partner's core business challenges.

# SNAPSHOT

## FROM THE PILOT OF TOOLS AND STRATEGIES<sup>9</sup> TESTED, AND IMPACT SEEN

### SALES

#### COMMON SALES BUSINESS CHALLENGE

Sales agents face mobility challenges, which in turn limit sales capabilities



#### STRATEGIES TESTED

Provide sales agents with capital to purchase demonstration kits

Address transportation, logistics, and security challenges by conducting sales at strategic locations

Incorporate gender-specific messaging on customer upsell calls



#### BUSINESS IMPACTS SEEN

**Sales increased 73%** after testing the impact of training women direct sales agents to sell using demonstration kits in public areas

**Sales increased 85% after testing** the impact of training women direct sales agents to sell in strategic sales locations

No significant difference in terms of along gender lines

Sales increased 73% and 85%

### MARKETING

#### COMMON MARKETING BUSINESS CHALLENGE

Lack of awareness of product/brand among target customer



#### STRATEGIES TESTED

Develop new messaging using gender-disaggregated market research

Develop new messaging using gender-disaggregated customer feedback



#### BUSINESS IMPACTS SEEN

No significant change in sales can be attributed to the tool to date

In an online marketing campaign, gender-specific **messaging targeting women reached twice as many people** as messaging targeting men.

Messaging reached twice as many people

## MARKET RESEARCH

### COMMON MARKET RESEARCH BUSINESS CHALLENGE

Lack of market research on gender-specific needs and challenges within the sector



### STRATEGIES TESTED

Complete gender-inclusive market scoping studies (2)



### BUSINESS IMPACT SEEN

Pilot's time frame was too short to demonstrate impact

## CUSTOMER CARE AND SALES

### COMMON CUSTOMER & SALES BUSINESS CHALLENGE

Customer care teams need to increase efficiency and improve customer experience during post-sale efforts



### STRATEGIES TESTED

Incorporate gender-specific messaging during customer education calls



### BUSINESS IMPACT SEEN

**A 33% reduction in time spent** by call centre agents on technical support calls with clients after applying gender-specific messaging to customer service calls

## HIRING/RECRUITMENT FOR SALES AGENTS

### COMMON HR FOR SALES AGENTS BUSINESS CHALLENGE

Sales agent attrition; inability to recruit or retain high performing sales agents



### STRATEGIES TESTED

Implement gender-aware recruitment, training and compensation changes to retain highly skilled sales agents (series of four tools)



### BUSINESS IMPACT SEEN

By the second month of testing, sales agents hired under new processes **sold two times more than agents in the control group**

33% less time spent by agents

Sales doubled under new practices

# LESSONS LEARNED

# A

wealth of learnings was uncovered about which gender inclusion tools were most successful in demonstrating the business case, and about how to best engage stakeholders in testing new activities. Much of the pilot's foundational hypotheses were validated, and many new insights were captured.

A few of these are included here:

**Sex-disaggregated data is an essential first step for incorporating gender inclusion strategies into an enterprise's work, and testing the impact on business performance.**

Businesses can use data they already collect to make smarter decisions. Information about sales, sales team performance, marketing efforts, customer profiles or product demand can be more effectively used by businesses when disaggregated by sex or by conducting a gender analysis of current data. This information can provide a business with important information about their customer segments, which can, in turn, lead to meaningful and profitable changes.

**Putting "skin in the game" and generating buy-in will support successful outcomes.**

Businesses must see and understand the potential benefit of a gender-inclusive approach, and be willing to invest their own resources. The potential for the business case is a powerful motivator. Designating a **gender champion to drive** changes to "business as usual" will enhance uptake and success. Investing time into **awareness-raising for stakeholders and staff about how gender inclusion can impact performance is also a way to enhance success.** Understanding *why* changes to existing business practices are occurring is important to generate buy-in, and crucial for sustaining and fostering adoption of new tweaks to business practices.



### **Positive results and processes help businesses think about deeper and further impact.**

These strategies saw quick wins- in turn demonstrating that increased business efficiencies and enhanced performance ultimately provide further motivation to carry on and test additional activities. Businesses and CEOs see the diverse ways gender can be a lever to maximise market share and efficiencies, as well as have impact on women's lives. The process has the power to support businesses in communicating this to stakeholders. In addition, **positive results can lead to leveraging further investment.** Businesses tapping into gender inclusion to maximise market share and impact will ultimately have an additional tool at their disposal when seeking investment.

### **Gender dynamics vary across contexts.**

Country context, product and region affect gender dynamics which, in turn, impact business operations. For example, in one country from this study, household purchasing for large equipment was decided equally by men and women, while in another country, purchasing decisions for the same equipment were made largely by men alone for their families. Such differences highlight the importance of understanding and analysing the local context and learning how it influences business operations.

### **There is no “one-size-fits-all” solution, and gender and business-focused technical assistance is an important ingredient of choosing the right approach.**

The business-first emphasis requires technical support to determine fit, to carry out changes and to track their impacts. Support is also needed to help CEOs generate buy-in and awareness across the business through gender intelligence awareness-raising. The opportunity remains for discovering which of the strategies or tools can be implemented by businesses themselves; some require more technical assistance than others, depending on factors such as the strategy's complexity, and the businesses' maturity as well as ability to dedicate required resources. A key challenge going forward will be to test the replicability and scalability of the tools to a variety of business models, along with testing the required levels of technical assistance needed for optimal performance.

# THE TOOLS TESTED AND THE RESULTS: A CLOSER LOOK

This section provides a closer look at the tools and strategies developed in the five business areas mentioned above. Included is an overview of why gender is key to the business area identified, a snapshot of the activities carried out and a summary of the results. Also included is a list of the resources designed to guide step-by-step implementation of the tools. Those efforts are summarised in varying levels of specificity, with the purpose of sharing the general process, outcomes and learnings.

Further information about these tools will be made available to Shell Foundation partners interested in testing the approaches outlined.

Outlined here is a summary of the efforts undertaken to date, which will be tested for scale in 2018-19.

## Tools Categories:<sup>10</sup>



### 1. Sales



### 2. Marketing



### 3. Market Research



### 4. Customer Care



### 5. Hiring for Sales

# TOOL #1

## SALES

This is a high-level overview of why gender inclusion is important for each business area identified, the steps taken to test each Activity during the pilot, a summary of results found and a list of key resources.

### WHY GENDER INCLUSION MATTERS FOR SALES

Gender diversity in the salesforce can lead to better results: Data indicates female sales agents in clean energy enterprises have higher sales performance than their male peers, along with a greater ability to build and maintain relationships in local communities. For instance, a recent study of male and female entrepreneurs in the clean cookstove sector found that female entrepreneurs sold nearly three times as many cookstoves as men.<sup>11</sup> Other results from the pilot pointed to the time-saving benefits of using gender-specific sales messaging that more effectively engages women customers who tend to be the end-users of many household energy products. Businesses facing sales-related challenges, or seeking to build on current sales success, can increase profits and productivity by pursuing a gendered approach to sales.

### GENDER-INCLUSIVE SALES ACTIVITIES TESTED

A selection of gender-inclusive sales strategies were tested. The following sections focus on three of these strategies:

#### **ONE**

Providing supplemental capital for sales agents

#### **TWO**

Mapping strategic sales locations and training agents in group sales techniques

#### **THREE**

Communications during the upsell process



## SALES ACTIVITY 1.1



### PROVIDING SUPPLEMENTAL CAPITAL FOR SALES AGENTS

The pilot tested the impact of providing sales agents with “demonstration kits” that included a selection of products to be sold during live demonstrations. The business purchased these kits on behalf of its sales agents—a shift in strategy which typically requires agents to purchase their own kits for use. This shift in sales strategy improved agents’ chances of success, especially for those who could not purchase new products for use in demonstrations on their own. The pilot partner was an India-based medium enterprise with a direct sales force (over half of whom are women) that sells products for household use. Analysis of the business challenges revealed that direct sales agents required capital in order to be successful in their sales efforts, including for transportation, cell phone bills and demonstration products. Many agents lacked the resources to purchase these necessities. This was particularly true of female agents, who also tend to have less access to credit and assets such as cars, computers, tablets and cell phones that can be necessary to make sales. This Activity focused on helping the business determine the capital needs of sales agents, and offered businesses guidance for implementing a plan to provide their sales agents with the necessary capital; it also supported the business in evaluating sales impact. Finally, this Activity aimed to identify gender-specific challenges or opportunities in sales activities, and how to use these findings to improve overall sales performance.

#### IMPLEMENTATION OF ACTIVITY

This Activity was implemented and tested over a two-month period, and included the selection of a group of women sales agents trained in a one-day workshop on how to use the demonstration kits and how to deliver the product information during sales to potential customers. The group was given specific guidelines and instructions for conducting these demonstrations, including how to engage customers in a group setting, how to inform the customers about product specifications and how to capture and report data on the activities and sales generated.

#### RESULTS AND KEY LEARNINGS

The Activity was very successful.

Women in the treatment group **sold 57% more units per week** than women sales agents in the control group.

In total, the demonstration kits along with strategic sales locations helped women sales agents in this pilot **increase sales by 73%**.

In both the control group and treatment group, women sales agents spent an average of three to four hours per day conducting sales, meaning that women sales **agents in the pilot were able to increase sales of products without increasing time spent on sales.**

## SALES ACTIVITY 1.2

### MAPPING STRATEGIC SALES LOCATIONS AND TRAINING AGENTS IN GROUP SALES TECHNIQUES

Women sales agents often face gender-specific constraints which impact their sales potential. These can include a lack of adequate and reliable transportation, safety concerns or constrictive social norms that restrict their mobility, which in turn impact and limit sales activities to a reduced geographic area. Women also confront multiple demands on their time, due to gendered social norms that assign household and care responsibilities to women. This can limit the time women have and, consequently, the number of potential customers reached. This Activity outlines a process for assessing the limitations faced by women sales agents selling in a door-to-door model, and for developing a strategic sales location map and training for sales agents on how to sell in a group or public setting. This Activity seeks to understand and address the challenges women agents face, and enable companies to test the effectiveness of alternative sales methods, including strategic product demonstrations, ultimately allowing agents to reach numerous potential customers in one location at one time. The tool aims to guide businesses through an end-to-end process for women sales agents conducting strategic product demonstrations—from training agents on how to sell in a group or public setting, to selecting appropriate locations, to the implementation and format of the demonstration.

#### IMPLEMENTATION OF ACTIVITY

This Activity was tested over a two-month period, and included the selection of a group of men and women sales agents to test the Activity. A one-day workshop trained agents on how to conduct demonstrations in public locations and how to pitch products to an audience. Guidelines and instructions provided focused training on how to engage customers in a group setting, how to pitch product specifications, and how to capture and report data on the activities and sales generated.

#### RESULTS AND KEY LEARNINGS

The results of this pilot were impressive. In the treatment group, **women sales agents sold 54% more per week than the control group.** In total, the demonstrations at strategic sales locations helped women sales agents **increase sales by almost 85%.**

In both the control group and treatment group, women sales agents spent an average of two to four hours per day conducting sales, meaning that **sales agents in the pilot were able to increase their sale of products without increasing time spent on sales.**

Finally, **women sales agents outsold male agents in the treatment group by 44.6%.** Female agents also **generated 52.3% more sales revenue than male agents.**



## SALES ACTIVITY 1.3

### DEVELOPING GENDER-SPECIFIC COMMUNICATIONS DURING THE UPSELL PROCESS



Many businesses have cross-selling opportunities, product upgrades or add-ons for customers after an initial purchase; yet successful upselling requires a specific skill set in addition to an understanding of your customer segments and product end-user. In some cases, women control household purchasing decisions, and many household energy products are targeted at women as the intended users. However, many businesses follow a standard process that does not challenge assumptions nor verify who the end-users of their products are. This Activity aims to improve the upselling process by posing a series of questions to gain data on the sex of the end-user. This Activity also tests the impact of specific messaging targeted differently to women and men, in order to determine if gender-targeted messaging can increase the success rate of upsell calls. The Activity aims to reduce the time a sales team invests in the upsell pitch, and increase the success rate of the upsell process.

#### IMPLEMENTATION OF ACTIVITY

The Activity was tested on the participating company's sales-focused call centre agents, with an equal number of men and women customers contacted. Using the company's previous sales data and assumptions about which products are typically used by men and women, new messaging was developed to target specific product preferences and pitches based on the customer's sex.

#### RESULTS AND KEY LEARNINGS

The results of this pilot were ultimately inconclusive, meaning there was no statistically significant difference in the key areas measured, including time spent on pitch per item to each respective gender, product preference per gender or the success of product upsell calls per gender/product. However, the learnings reveal that the success of this Activity may have been impacted by other factors, such as the pilot partner's commission structure for sales agents; therefore, further testing may yield different results.

## RESOURCES FOR IMPLEMENTATION

A SERIES OF STEPS, GUIDANCE NOTES AND CHECKLISTS WERE DESIGNED TO SUPPORT THESE ACTIVITIES. THESE INCLUDE:

- **Gendered Business Diagnostic Checklist:** This is a checklist for businesses implementing a sales Activity, focused on assessing business opportunities, challenges and gaps based on current processes related to sales.
- **Baseline Data and Weekly Data Collection Reporting Template:** This is a baseline assessment of current sales agents' performance and should be conducted to gather quantitative and qualitative data on the limitations and needs of sales agents; all data collected will be sex-disaggregated.
- **Guidance Questions: Choosing the Right Activities for Your Business:** This is a list of guidance questions intended to help businesses develop a list of action items/next steps for pilot implementation.
- **Key Action Items:** This is a suggested list of *Key Action Items* to help businesses determine next steps for testing sales Activities.
- **Work Plan Checklist:** This checklist will be based on the *Key Action Items* and will establish next steps, identify responsibilities, and set targets and deadlines for teams to follow in order to carry out and measure the Activity's impact.
- **Data Analysis Questionnaire:** This formal questionnaire will categorise the key questions the Activity set out to address; comparing the results of the Activity under this will also include an assessment of any qualitative responses to key questions.
- **Calculating Return on Investment (ROI) Template:** This is a guidance process to measure the results of this Activity done with a focus on overall sales impact and efficiency of agents, in order to determine if the selected Activity is ultimately a useful and business-positive initiative.



# TOOL #2

# MARKETING

This is a high-level overview of why gender inclusion is important for each business area identified, the steps taken to test each Activity during the pilot, a summary of results found and a list of key resources.

## **WHY GENDER INCLUSION MATTERS IN MARKETING**

Businesses should ensure they are maximising opportunities to reach all male and female customers and employing language that resonates with customer needs. The pilot found that most businesses were not capturing sex-disaggregated information about their markets, nor utilising this data to inform marketing messaging techniques. The various gender-inclusive marketing tools tested during the pilot aimed to support businesses in better understanding the different needs of men and women customers, and to tailor messaging to meet those needs.

## **GENDER-INCLUSIVE MARKETING ACTIVITIES TESTED**

The pilot tested a variety of gender-inclusive marketing Activities, two of which are examined here more closely. The first Activity focuses on gathering, testing and analysing sex-disaggregated customer feedback to be utilised when developing a marketing strategy in new markets, while the second focuses on gathering sex-disaggregated feedback from existing customers on their experience with a product/service in order to incorporate that feedback into marketing messaging.

# MARKETING ACTIVITY 2.1

## UTILISING SEX-DISAGGREGATED CUSTOMER FEEDBACK FOR DEVELOPING A MARKETING STRATEGY IN NEW MARKETS



As businesses seek to enter new markets, understanding the needs and challenges of customers is essential for developing brand positioning as well as marketing messages. Understanding customer needs and challenges as they relate to a business' product or service, and collecting sex-disaggregated customer feedback about those needs and challenges, can provide valuable insights for a business looking to develop a marketing strategy for a new market, region or customer segment that can, in turn, be used to better inform messaging and increase sales. This Activity was developed to support a business selling large agriculture equipment in a new region, in how to design and collect customer feedback on customer needs and challenges related to on-farm equipment, daily farm activities, and desired products to ease daily workloads and increase farm efficiencies. By gathering this sex-disaggregated feedback, the business was able to develop changes to its existing marketing methods and messaging. The changes were then measured for sales impact.

### IMPLEMENTATION OF ACTIVITY

This tool was carried out first by holding community group meetings and focus group discussions, and by collecting data on women's and men's distinct perceptions of the product, as well as on specific on-farm and household challenges facing potential customers in a new geographic market. The findings were then analysed and used in new messaging prompting the benefits of the equipment, targeting men and women differently. The new messaging was tested at various community group meetings held by technical team members of the farm equipment business as part of their standard sales process. The objective of the meetings was to measure and compare the impact of gender-disaggregated messages targeting women with generic, mixed- gender messages; the ultimate goal was to engage potential customers enough to obtain contact information for follow-up visits to farms by technical agents, as a final step in the sales process.

### RESULTS AND KEY LEARNINGS

The strategy of delivering gender-disaggregated messaging did not increase the number of sales, diagnostics and inquiries received. However, when measuring the impact of messaging targeting women, the **data indicated increased awareness of the company brand within the community.**

Interestingly, the pilot found that most men and women agreed that it was necessary to consult with their spouse before giving out their contact information for a sales visit to their home, **implying potential equity in decision-making for larger purchases in this new market.**



## MARKETING ACTIVITY 2.2

### GATHERING SEX-DISAGGREGATED FEEDBACK ON CUSTOMER EXPERIENCE TO DEVELOP TARGETED MESSAGING

Many businesses overlook the wealth of strategic customer knowledge they could gain by collecting sex-disaggregated customer feedback on their product(s). This feedback can provide valuable insights that can be used to better inform messaging, thus potentially increasing sales. This Activity supports businesses in designing and collecting customer feedback on product use and satisfaction, tracking changes made to marketing methods and messaging based on feedback, and measuring the impact of those changes on sales. During the pilot, we collected gender-disaggregated customer feedback, and proceeded to use that data to test the impact of gender-specific messaging (created based on this feedback) in an online Facebook campaign attracting new customers in existing markets.

#### IMPLEMENTATION OF ACTIVITY

Under this Activity, women and men household heads from a mix of regions where the business' customers are located were interviewed about their experiences and satisfaction levels with the business' products. These interviews were analysed to assess the key differences among men and women regarding their experiences, challenges and satisfaction levels with the products. New, gender-specific messaging was then developed to target men and women separately based on this feedback. This customised messaging was then used in an online campaign meant to create awareness of the business' products, and to secure follow-up visits by technical teams to customer farms. Three different online campaigns—one targeting women, one targeting men, and another targeting a mixed-gender group—were designed, with each focusing on findings and key messages for the specific target audience. The mixed campaign served as a control tool, advertising generic messages which corresponded to the type of messages found in the business' typical campaigns. All ads were displayed in the business' Facebook page for a three-week test.

#### RESULTS AND KEY LEARNINGS

The overall findings found that men have a significant or even dominant role in the decision-making process regarding farm equipment. During the three-week test, the men-only group produced the most leads, while the mixed-gender group generated only three women leads. After the women-only group resulted in no leads during week one, the business decided to change the objective of the test from filling out a form (providing contact details) to measuring the level of interaction or engagement with the advertisement, the hypothesis being that women may not feel sufficiently empowered to complete a form with their contact details.

While no sales could be directly attributed to the new messaging/online campaign tested under this strategy, findings indicated that the new messaging reached more customers than previous campaigns.

After changes were made to the objectives of the women-only campaign, **it was found that the average number of customers reached in the two women-only groups targeted on Facebook more than doubled the number reached in the men-only group and more than quadrupled the number reached in the mixed-gender group.**

Additionally, when looking at the number of people interacting with the campaign by gender, it was found that **more than four times the number of customers were reached in the two women-only groups targeted on Facebook than in the men-only and mixed-gender group.**

These findings demonstrated the effectiveness of gender-specific messaging, with the messages targeting women having a significant impact on online interactions. The quality of the interaction remained consistent, with "visiting the web page" the most common action, followed by "sharing the post" with someone else.



## RESOURCES FOR IMPLEMENTATION

A SERIES OF STEPS, GUIDANCE NOTES AND CHECKLISTS WERE DESIGNED TO SUPPORT THESE ACTIVITIES. THESE INCLUDE:

- **Gendered Business Diagnostic (Marketing in Current Areas) Checklist:** This is a checklist for businesses implementing this set of Activities, focused on assessing business opportunities, challenges and gaps based on current processes related to marketing, and specifically related to developing marketing strategies and messaging based on customer profiles, challenges and perceptions of the industry/sector/technology. This assessment will also focus on a new market customer base, specifically a target customer profile, and size of the market.
- **Checklist for Planning Your Focus Groups or Interviews:** These checklists will enable businesses to conduct male- and female-only focus groups and/or interviews to gather feedback from target customers on their current needs, challenges, preferences and aspirations as related to a product/service.
- **Gender Considerations List for Focus Groups and Interviews:** This list will support businesses in the key step of designing focus groups and interviews that can help determine if there is any local awareness of their specific product/brand/technology in the new market—and if so, what the current perceptions are. It is important that in this process businesses gather the opinions and experiences of both men and women from a range of socio-economic backgrounds, separately as well as in mixed groups.
- **Work Plan Checklist for Marketing Activities:** This checklist will establish steps, identify responsibilities, and establish processes for how to utilise customer feedback and develop it into new, gender-specific messaging, or to make changes to an existing marketing strategy. It will also help businesses determine where/how to place new messaging based on gender preferences, and how to measure efforts to determine the impact on sales.
- **Interviews/Focus Group Questions for Data Collection and Gender Considerations for Data Collection Checklist:** This checklist will track and report data from the implementation of focus groups and/or interviews, in accordance with the schedule outlined in the work plan, applying specific considerations for gender-sensitive data collection.
- **Data Analysis Questionnaire:** This formal questionnaire will focus on overall sales impact, new data points gathered and new methods used for marketing; it will support businesses in determining if the Activities are ultimately useful and business-positive, and if/when to scale them internally.

# TOOL #3

# MARKET RESEARCH

This is a high-level overview of why gender inclusion is important for each business area identified, the steps taken to test each Activity during the pilot, a summary of results found and a list of key resources.

## **WHY GENDER INCLUSION MATTERS IN CONDUCTING MARKET RESEARCH**

Conducting gender-specific market scoping can help businesses identify and tap into new opportunities by seeing the full spectrum of their customer segments. Businesses can maximise sales opportunities in a new market by ensuring that all customer needs—those of men and women—are clearly understood, recognised and incorporated into business operations.

## **GENDER-INCLUSIVE MARKET RESEARCH ACTIVITIES TESTED**

The aim of this gender market analysis of the solar industry was to seek opportunities to expand into new geographic markets, and better understand the opportunities for, and challenges facing, employment for women in the sector.



# MARKET RESEARCH ACTIVITY 3.1



## GENDER-INCLUSIVE MARKET SCOPING STUDIES

Market research can assist businesses in understanding the needs and preferences of potential customers, and in learning how to shape product design, sales strategies, marketing plans and other core business elements to new markets. Despite this potential, many businesses fail to tap into the wealth of data that comes from understanding gendered customer needs and preferences. This Activity was used to survey the market for untapped, gender-specific opportunities, demand, preferences and needs for products and services for the purpose of reaching diverse market segments and customers. As a result of using this Activity, businesses developed a formal practice for conducting a gender-inclusive market assessment in a new domain or geographic area, and for redefining existing markets on the basis of gender.

### IMPLEMENTATION OF ACTIVITY

The Gender-Inclusive Market Scoping Study undertaken during this pilot was a set of short, sector-specific studies designed to establish data-based recommendations for expanding a business' marketing strategies in a new or evolving market. The first study was heavily focused on desk research and expert interviews to understand the conducting desk research to understand the scope employment opportunities for women in the sector. The second study built on the first study's findings, and included focus group interviews with women seeking employment in the sector.

### RESULTS AND KEY LEARNINGS

Based on the findings of this scoping, a set of recommendations was developed for businesses to follow as next steps. These included recommendations on the design of new products and distribution mechanisms and strategies to reach women, and ideas for future marketing strategies. The business undertaking the studies for the pilot found the gender market analysis and its initial recommendations useful, and identified a need for a follow-up scoping study, including in-person focus groups and interviews, that would undertake a deep dive into some of the main trends and questions that arose during the analysis.

## RESOURCES FOR IMPLEMENTATION

A SERIES OF STEPS, GUIDANCE NOTES AND CHECKLISTS WERE DESIGNED TO SUPPORT THIS ACTIVITY. THESE INCLUDE:

- **Guidance Questions for Developing Objectives and Impact Measurement:** This guidance note will help businesses draft market scoping objectives and develop a work plan for a market research survey and focus group preparation. As businesses develop a market survey and focus group process plans, it is essential to apply gender considerations to each step of the process.
- **Online Survey Questions/Focus Group Discussion Questions and Gender Considerations for Data Collection Process:** These questions will help businesses design a market research survey with a gender focus, which will support businesses in understanding gender-disaggregated customer preferences and needs while keeping key gender considerations in mind. The questions asked in the market scoping survey, focus groups and interviews are not only capturing equal responses from men and women, but are also helping to:
  - Understand how products/services are perceived by men and women
  - Understand how products/services are, or would be, used by men and women
  - Understand how men and women make diverse purchasing decisions related to product offerings
  - Understand how to assess how products meet the unique needs of men customers and women customers
- **Guidance for Response Summary Analysis:** This guidance note will help businesses conduct an analysis of data aggregated by gender groups to identify and summarise key themes and trends (i.e., compare how women answered questions as an aggregated group, and how men answered questions as an aggregated group); include trends identified along gender lines, differences noted between genders, gaps or challenges identified, and a summary of qualitative notes/assessments from the data collector on elements that may contribute to learnings. Based on this analysis, businesses will review learnings and determine how to best incorporate them into next steps so that messaging is streamlined for marketing purposes and made gender responsive.





# TOOL # 4

## CUSTOMER CARE

This is a high-level overview of why gender inclusion is important for each business area identified, the steps taken to test each Activity during the pilot, a summary of results found and a list of key resources.

### **WHY GENDER INCLUSION MATTERS IN CUSTOMER CARE**

Understanding the different preferences between men and women and their experiences with products and services will enable businesses to tailor their customer services more appropriately. Utilising sex-disaggregated data to better understand who product end-users are will allow businesses to serve customers more efficiently, saving time and resources. Additionally, by understanding if or how men's and women's preferences differ, after-sale care can be tailored to serve customers better, improving satisfaction and potentially increasing the number of repeat customers.

### **GENDER-INCLUSIVE CUSTOMER CARE ACTIVITIES TESTED**

This tool is designed to increase the success of customer care activities for organisations with dedicated customer care agents or teams. Specifically, this tool will guide businesses through the process of developing different messaging to target men and women during customer interactions, whether they be related to product education, training, technical support or other after-sale support issues.

# CUSTOMER CARE ACTIVITY 4.1



## GENDER-SPECIFIC MESSAGING ON CUSTOMER EDUCATION CALLS

This Activity aims to save businesses time and money by improving the initial post-sales customer care experience, and by making your customer care services more efficient. By ensuring that end-users receive tailored customer care calls/support and relevant product information, businesses will save time and effort. It can also help businesses retrieve customer feedback about their initial experience of using a product.

The business testing this Activity in the pilot did so through its call centre agents, who typically give customers an “education call” immediately after selling them its clean energy, household use products, to advise on product activation and technical use. According to its own data, the business found that 32% of technical support calls answered basic questions already covered in the education calls, wasting an enormous amount of time and money. The education calls are placed to the “primary contact”, i.e., the person who purchased the device, and the business assumed that the majority of these users were men. However, in the cases where the primary user is not the end-user, the basic training is likely being given to the wrong customer. If the “correct” end-user customer were given the education call, the number of technical calls to the call centre would diminish and customer service would improve. These efforts together would save this business time and money, and leave call centre reps more time to focus on incoming calls.

### IMPLEMENTATION OF ACTIVITY RESULTS AND KEY LEARNINGS

This Activity began with the development of a new script for call centre agents to use, one which included specific questions to ensure call centre agents were reaching “end-users” before beginning their education call training, and which ensured the sex of the end-user was documented. The call centre agents participating in the Activity were then trained on conducting calls using this new script. A random selection of client contacts were then contacted, and the new script was used on these customers. The Activity revealed that, for this test group, only 41% of the primary customer contacts initially reached were in fact the end-users of the product sold. The pilot’s results were determined at the end of the pilot by comparing device issue data from the pilot group and a control group in the call centre.

Overall, the business piloting this strategy found that educating end-users, rather than buyers, on how to use the device resulted in fewer device issues being raised and less time spent on customer support calls and troubleshooting.

When measuring the number of calls related to device issues received by the call centre, it was found that customers in the pilot group (i.e., end-users that had been contacted and educated) raised fewer issues than customers in the control group.

- **Calls specific to component issues: 14% fewer issues from contacted/educated end-users vs. control group**
- **Calls specific to control box issues: 33% fewer issues from contacted/educated end-users vs. control group**

Additionally, when measuring the time spent handling device issue calls, **customer care representatives assisting customers in the pilot group spent 12 seconds less on component issues, 27 seconds less on control box issues and about 3.3 minutes less on credit issues.**

Finally, in a surprising finding, of the end-users of one of the initial products sold, 83% were women. This was unexpected since the business’ hypothesis was that 80% of its end-users were male. These learnings indicate a need for a deeper analysis of the end-user customer base, and have **potentially significant implications for sales targeting and marketing efforts.**



# CUSTOMER CARE TOOL

## RESOURCES FOR IMPLEMENTATION

A SERIES OF STEPS, GUIDANCE NOTES AND CHECKLISTS WERE DESIGNED TO SUPPORT THIS ACTIVITY. THESE INCLUDE:

- **Gendered Business Diagnostic Checklist for Customer Care Calls:** This is a checklist for businesses implementing this set of tools, focused on providing guidance on how to establish objectives (customer care goals) and metrics for impact measurement of the changes made to customer care messaging. This checklist also offers guidance on how to create an internal work plan for businesses to determine if/what new messaging should be tested to integrate gender into customer care calls, and how to link those efforts to a sales impact.
- **Data Collection for Baseline:** This guidance note will support businesses in conducting a baseline assessment which should provide enough information to make concrete determinations regarding gender-inclusive messaging within the post-sale customer care call process.
- **Guidance Questions for Development of New Messaging:** This guidance note should be used after reviewing current practices and messaging, and establish new messaging for testing and implementing this messaging as per the work plan. The new messaging should be piloted by call centre agents and data collection completed by the appropriate employees/consultants.
- **Data Analysis and Reporting:** This template will help businesses conduct data analysis of sex-disaggregated information based on predetermined metrics to determine if the Activity is ultimately a useful and business-positive initiative, and if/when to scale the tool internally if it proves to be successful.







# TOOL # 5

# HIRING AND RETENTION OF SALES TEAMS

This is a high-level overview of why gender inclusion is important for each business area identified, the steps taken to test each Activity during the pilot, a summary of results found and a list of key resources.

## **WHY GENDER INCLUSION MATTERS IN HIRING FOR SALES TEAMS**

A number of gender-specific opportunities to solve business challenges can be found in the hiring process, in outreach, training, upward mobility and retention. Understanding the specific hurdles to overcome in order to access the right talent, and to ensure that women-sales teams are able to reach their potential, as well as be retained in the company, can increase sales team performance, reduce hiring costs and promote employee loyalty. Additionally, this can also have a significant, positive impact on women's income-generating potential and self-confidence.

## **GENDER-INCLUSIVE SALES ACTIVITY TESTED**

The pilot tested a set of Activities aimed at hiring and retaining a gender-inclusive sales team, two of which are included here: Applying a Gender Lens to Improve Hiring Practices and Increasing Sales Force Retention..

# HIRING ACTIVITY 5.1



## APPLYING A GENDER LENS TO IMPROVE HIRING PRACTICES

Many businesses face challenges in recruiting for and managing sales teams, such as those related to identifying and recruiting quality sales agents; low sales performance by staff; and high turnover or attrition rates. This Activity will support businesses to hire and retain more qualified, skilled, successful and enthusiastic sales representatives. It also addresses the challenges many businesses face when striving to hire women on their sales teams, such as challenges in reaching women during the recruiting process or conducting interviews in locations which present logistical or security challenges for women. This Activity will walk you through how to revise or improve your process for recruiting and hiring sales agents for your direct sales business. Many businesses' hiring practices are informal or referral based. While these practices can be helpful, if a business is struggling with sales, then examining the hiring process for sales agents can be an essential first step to improvement. Gender considerations are essential in hiring practices as well, as simple efforts to be more inclusive during the hiring process can increase the number of women applicants and hires for sales roles.

## RESOURCES FOR IMPLEMENTATION

**A SERIES OF STEPS, GUIDANCE NOTES AND CHECKLISTS WERE DESIGNED TO SUPPORT THIS ACTIVITY. THESE INCLUDE:**

- **Guidance Questions for Hiring Assessment:** This guidance note will help businesses conduct an internal review of current processes and trends, including a review for gender-specific challenges, such as a lack of women applying for sales roles or gendered patterns in hiring, retention and performance. This will identify gaps and opportunities in incorporating gender considerations into the recruitment process.
- **Guidance Note for Hiring Assessment:** This guidance note will help businesses identify where the process gaps or opportunities lie, allowing organisations to compare current qualifications/requirements of sales agents hired to determine if there are missing opportunities.
- **Gender-Inclusive Recruitment Practices Checklist:** This is a checklist that will consider gender factors and help businesses to revise the process if it's determined that women are not being sufficiently included in the process. Therefore, in addition to a revision of qualifications, there should also be a review and possible changes made to recruitment methods to ensure gender inclusion.
- **Gender-Inclusive Formal Recruitment Process:** This guidance note will support businesses in incorporating effective gender-inclusive recruitment and hiring practices for a sales team into new or existing processes. This should follow the suggested steps in the *Gender-Inclusive Recruitment Practices Checklist*, in order to ensure the process is inclusive for all applicants.





## HIRING ACTIVITY 5.2

### INCREASING SALES FORCE RETENTION

High turnover rates or low retention rates of sales agents can be costly, both in terms of financial costs and additional time spent on the hiring and training processes. When employees leave a company, there is a loss of institutional knowledge along with skill and experience. This Activity will help your business determine its core challenges with sales force retention, and offer guidance for how to address these problems. By examining your retention data and assessing causal factors, such as sales agents' income, competitors' compensation packages and non-financial factors like long work hours, this Activity will help your business adjust and take steps to increase retention. This Activity will also provide your business with a process to evaluate retention issues, and a process to determine how to select which practices will be the best fit for your business, ultimately improving staff retention and reducing business costs.

### RESOURCES FOR IMPLEMENTATION

**A SERIES OF STEPS, GUIDANCE NOTES AND CHECKLISTS WERE DESIGNED TO SUPPORT THIS ACTIVITY. THESE INCLUDE:**

- **Guidance Questions for Gender-Inclusive Retention Assessment:** This guidance note will help businesses conduct an internal review of retention/attrition data or history, looking for trends and practices to be addressed, including a review for gender-specific challenges or issues that may impact female sales agents disproportionately.
- **Developing an Action Plan to Assess New Retention Practices:** After reviewing the *Guidance Questions for Gender-Inclusive Retention Assessment*, this document will help businesses to determine the core challenges related to retention for female and male sales agents. The analysis should include all areas related to retention, including compensation structure and packages, working hours, logistics, additional costs incurred by sales agents, security issues, job satisfaction, opportunities for progression and career development, amongst others.
- **Gender-Inclusive Retention Action Plan:** This action plan will support businesses to develop a roadmap to increase retention, including establishing a time frame for testing new practices, and assigning ownership internally to oversee the process.

## IMPLEMENTATION OF ACTIVITIES 5.1 AND 5.2

The business testing this Activity has a direct sales force comprised of a majority of women sales agents who were struggling to meet sales goals. Due in part to low sales performance and the commission-based fee structure for sales agents, retention also presented a clear challenge. The Activity developed for the pilot included a series of steps to change the business' recruitment process and compensation package for a select group of newly hired sales agents, and to assess and address gender-specific challenges facing agents. The Activity included gender-sensitive changes to the qualifications set for sales agents and the recruiting/interview process, adjustments to the training format for sales agents, and changes to the compensation package with the goal of attracting or retaining highly skilled and/or experienced sales agents.

## RESULTS AND KEY LEARNINGS FOR ACTIVITIES 5.1 AND 5.2

While the Activities adopted during the pilot did not address all of the core business challenges facing the business, such as those related to product pricing, they did ultimately help to meet or exceed the initial targets set. When measuring the sales performance data of the sales agents hired under the pilot, the minimum sales target sold per day, per agent was not met; however, **these agents did outperform sales agents hired under the traditional method, selling on average more than double the number of products per day.**

# SEX- DISAGGREGATED DATA: THE PLACE TO START

The fundamental step for  
gender inclusion in business:  
Collecting and utilising  
sex-disaggregated data



# W

hile the pilot tested a wide variety of tools and activities, as outlined above, there was one core, cross-cutting action which was fundamental to all of the pilot's recommended activities: collecting, analysing and utilising sex-disaggregated data. Using sex-disaggregated data is essential for businesses to gather the most useful information about business operations, and doing so often occurs with minimal additional effort or resources. The key for SMEs is understanding where they can collect this data—and how to best use it.

### What is sex-disaggregated data?

Sex-disaggregated data refers to data that is collected separately for women and men, by tracking whether the individual performing the task or making the decision is female or male, and is analysed accordingly. This can range from something as simple as tracking the number of male and female members in your teams, to tracking sex-disaggregated data with respect to product or service design (male or female buyers and end-users, user-centric design), customer feedback for your products or services (taking into consideration men's and women's differing feedback), and leveraging the different strengths of your male and female team members depending on the context, product/service and the project.

### Why is it important for my business to collect this kind of data?

Leveraging insights derived from the collection and analysis of sex-disaggregated data will provide crucial learnings for your business across the value chain:

#### ● Customer centricity

A diverse workforce is better able to understand customer needs, because when your workforce reflects the diversity that can be found in your customer base, they are able to improve the quality of the offerings of your product/service.

#### ● Talent management

Attracting a diverse and inclusive workforce can stimulate creativity, innovation and a wider range of opinions. Increased employee satisfaction can lead to higher retention rates as well.

#### ● Effective marketing

Companies that embrace diversity and inclusion in their customer base are better positioned to understand their customer needs, and better able to reflect and communicate customer needs in their messaging.

#### ● Improved performance

Companies with a greater understanding of their customer base, and how both men and women engage with and use their product/services, will be better positioned to successfully sell to customers.

### How will this data impact my business?

The data collected and subsequently analysed will enable you to make informed, data-driven and customer-experience-centric decisions around the key business challenges you face.

# A CHECKLIST FOR HOW TO COLLECT SEX-DISAGGREGATED DATA



## MARKET RESEARCH

Gaining sex-disaggregated information about customer segments, customer needs or demands, and the competitive landscape is essential to any growing business looking to develop strategic plans around expansion into new geographic areas, new customer segments or new product/service offerings.

### Guidance Questions:

- What is the gender split of our customers?
- Are our buyers the same as our end-users (in the case of products that can be bought)? Is there a divide along gender lines?
- Do we have data on demand for our products/services based on gender?
- Are competitors in a similar industry or in the same industry tracking these metrics?



## CUSTOMER CARE AND SALES

Sex-disaggregated data collection on customer care/after-sales can ensure or improve customer satisfaction to increase repeat sales.

### Guidance Questions:

- Of the number of customers that call for customer care and after-sales services, how many are women and how many are men?
- Of these, what is the gender split with respect to the actual end-users and buyers?
- What types of customer care/post-sale calls or issues are initiated by women customers? By men customers?



## SALES

By collecting sex-disaggregated data, business can better understand their customer needs, leading to increased sales, increasing efficiency of sales agents and increasing market share.

### Guidance Questions:

- What is the gender split of our sales and distribution teams?
- What are the performance metrics of the women and men sales and distribution agents?
- Do the women and men sales and distribution agents face particular barriers?
- What is the gender split of our customers?
- Does our product appeal more to women? To men? If so, why? How can this information be incorporated into our sales strategies?



## MARKETING

Sex-disaggregated data can help a business in determining marketing methods and messaging to reach and meet each customer segment.

### Guidance Questions:

- Is the messaging for our product/service marketing taking into account our gendered segments?
- Are the different needs of men and women customers being addressed in the business' marketing efforts?
- Which marketing methods are best to reach both men and women?



## HUMAN RESOURCES

Sex-disaggregated data can provide information for businesses to help increase retention rates of staff, decrease turnover rates, increase employee satisfaction and improve hiring processes.

### Guidance Questions:

- What is our workforce mix in terms of women and men at each level?
- For the most recent hiring period, what is the number of women and men that have been hired at each level?
- For the most recent period, what is the attrition or turnover rate for women and men employees at each level?



## SUPPLY CHAIN

Sex-disaggregated data can identify quality partners, improving costs and quality of inputs, increasing efficiency of logistics and supporting businesses.

### Guidance Questions:

- If the business requires partnering with external suppliers, what is the gender composition of those suppliers?
- How many women-led supply partners are included in the supply chain?



## DESIGN/VALUE PROPOSITION

By collecting sex-disaggregated data during the product design/value proposition development stage of its growth, a business can better understand the unmet needs of all customer segments and how to address them.

### Guidance Questions:

- Do we know what business challenges our product/service is addressing? Is it different for men and women?
- Is our target group adequately segmented according to gender, among other metrics?



# TAKING THIS WORK FORWARD

In 2018-2019, our organisations will continue to test the approaches outlined in the above sections, as well as co-design new approaches to test impacts on business performance.

## OUR GOALS

- Scale up the activities already tested, in order to gather additional data on the effectiveness of these approaches, across a new set of participating partner enterprises. A greater number of businesses will be invited to participate, focusing on SMEs with business-to-business as well as business-to-customer models.
- Test sustainability and longevity, and determine if the successful case studies lead to business-wide adoption of the strategies, and become embedded into SME core business practices.
- Build a bigger business case and return on investment by testing the ability to aggregate data points across business strategies undergoing further pilots.
- Design new approaches and test for business impact, based on business needs and challenges that were identified but not tested in Phase 1, as well as through further analysis of business challenges faced by a new set of partners.
- Leverage technology by using a digital platform for business assessments, and for implementing the developed tools, and create long-term benchmarks.
- Determine technical assistance needs for the SMEs implementing the tools, and test various implementation models in order to assess which strategies can be most effective with minimal outside support. The goal will be to gather insights about which strategies can be scaled with less technical assistance.
- Develop case studies and reports that highlight successes and failures, and that seek to share with wider audiences which activities and tools are working effectively, and which are not.
- Share and disseminate learnings through roundtable fora and webinars, and by widely sharing the learnings so that others can use this information.

## CONCLUSION

**In summary, gender inclusion has the power to generate positive business impacts, including increased efficiency and market share, increased employee satisfaction and retention, and increased effectiveness and efficiency across the clean energy sector value chain.**

Increased market share occurs where businesses better capture and meet the needs of all customers, giving businesses a competitive advantage. Employee satisfaction and retention are also key to thriving business models, and tapping into gender insights, as well as policies that promote retention of women, are seen by investors and businesses as key to sustainable models.

Finally, there is great potential to think about how these efforts can increase effectiveness and efficiency across the entire energy sector and within value chains, and ultimately improve adoption and access to clean energy for the world's most marginalised populations. The economic case for working towards gender equity in value chains lies in the understanding that the majority of production systems are structured by gender roles and responsibilities and that, as a consequence, any attempt to intervene in value chains will affect gender relations in some way. This will inevitably have wider consequences for value chain effectiveness and efficiency. In addition, when engaged and supported appropriately, women's involvement in value chains can improve access to female markets and increase sales.