

# COVID-19 Resilience Tools for Start-ups (& MSMEs)



Co-creation partners



# COVID19 Resilience Tools for Start-ups (& MSMEs)

## How to use the Toolkit?

### COVID-19 Resilience Toolkit

The COVID-19 Resilience toolkit is here to guide you to build business resilience. The tools can be completed one by one and do not build on each other. This toolkit is suitable for start-ups and enterprises that are looking to increase their resilience when faced with external or internal shocks that affect your operations.

### Tools – Step-by-step guidance

Each of the individual tools start with input slides to spark your knowledge and inspiration. The tool then helps to put your ideas into action and provides step-by-step guidance to arrive at key outcomes. The first page of each tool offers a short overview of **what** you do in the tool, **why** the tool is important, and **how** the tool is best used. The subsequent pages explain in detail what to do and which questions to ask yourself at each step.

### Worksheets – Document your outputs

Following the instructions for each step, you can find worksheets to document the outputs you create during the process of working your way through each tool. Some tools have only one worksheet, while other tools have one worksheet per step.

*The COVID-19 Resilience Toolkit was developed in a Co-Creation Lab with Ecosystem Actors and later piloted in a Pilot Workshop with Start-Ups and SMEs. It results from the collaborative work among our co-creation partners: Idobro, Development Alternatives and Startup Oasis.*



# COVID19 Resilience Tools for Start-ups (& MSMEs)

## What is in it?

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# COVID19 Resilience Tools for Start-ups (& MSMEs)

The Toolkit supports you to build business resilience measures and shock recovery measures to deal with internal and external shocks.



## COVID19 Resilience Toolkit



### ABCD Organisational Capabilities Assessment

Assess the readiness of your organisational capacities from the perspective of scale readiness.

### Financial Readiness Assessment

Advance the financial management strategy and prepare solutions for unmanaged finance risks.



### Persona-Based Service Delivery

Understand your customers and create your delivery strategy.

### MVP Blueprint

Prototype your MVPs' main business aspects.



### Go-to-Market

Prepare a cost-effectiveness analysis of your marketing channels.

### Diversifying Markets

Undertake a market diversification assessment to access alternative markets in the face of shocks.



### Benefits Management

Identify the benefits you create for your stakeholders and the risk that may disrupt the benefits delivery.

### ROPE Analysis

Explore future external and internal opportunities through project evaluation.

# Objectives of COVID19 Resilience Tools for Start-ups (& MSMEs)

## What you can expect to learn from using this toolkit?

### Identifying opportunities for start-ups such as yourselves to increase business resilience:

- Explore innovative solutions to address COVID-19 business-related challenges by completing the tool worksheets
- Improve business models by integrating COVID-19 resilience considerations
- Practical insights through examples from eco-inclusive SMEs
- Ideate solutions for marketing your services and products that fit the target market of your business

### Building enterprise resilience through organisational readiness, agile business, and market strategy:

- Learn about different evaluation methods to better access markets, build team capacities, and deliver your products or services
- Understand your business better by assessing critical business aspects such as key processes and resources



# ABCD Organisational Capabilities Assessment

# ABCD Organisational Capabilities Assessment

## When?

The *ABCD Organisational Capabilities Assessment* tool helps your organisation to assess the readiness of your organisational capacities from the perspective of scale readiness. You can use this tool when you are scaling up your business.

## What?

This tool guides you through five steps to assess your organisational capabilities. It focuses on the assessment of the four ABCD aspects: **A**ccess to markets, **B**uilding team capacities, **C**reating linkages, and the **D**elivery of solutions, to identify your readiness for scale-up and develop an action plan based on the results.

## How?

This tool should be used in a group setting, with team members with expertise in your different organisational areas (e.g. human resources, marketing & commercial department, etc.). Working as a group enables a good setting to conduct the assessment of these different aspects.

## Steps



## Key outcomes

- Assessing different aspects of organisational capabilities for scale up readiness
- Developing an action plan to improve organisational capabilities and achieve scale-up readiness

# ABCD Organisational Capabilities Assessment

## Step 01 Access to Markets

To identify your organisation's readiness for scale-up, the first step consists of assessing your current access to markets and your understanding of customers or beneficiaries. as well as assessing the needs in the new markets you are considering to enter.

During the COVID-19-pandemic, not only the organisations, but also the customers were heavily affected. Their needs and purchasing power may have changed (both in your current and in new markets), negatively affecting your organisation's sales and disrupting other economic activities along value chains.

In this first step, assess your access to markets by responding to the related questions in the *Worksheet: ABCD Assessment*.

## Step 03 Create Linkages

Relationships along the value chain are not only necessary as support in the face of critical times( as they allow you to continue operations), but are also critical when scaling-up.

In this step you will assess how valuable and/or risky the relationships with your partners are (formal and informal), as well as how many resources you must delegate towards them. Furthermore, you will assess their willingness and investment in supporting you in your scale-up process.

Complete the questions in the *Worksheet: ABCD Assessment* to assess your relationships and linkages.

## Step 02 Build Team Capacities

When planning for a scale-up, you need to rely on a capable team. Step 2 consists of assessing your team's capacities, including leadership, staff capacities, flexibility and resilience, and staff readiness for scale-up, or the ease of acquiring new capacities.

COVID-19 has accelerated the need for flexibility among staff to acquire new skills, especially around digitalisation. That is why when assessing for organisational readiness for scale-up you need to assess your staff's readiness and resilience towards unforeseen circumstances.

Complete the questionnaire about the built team capacities in the *Worksheet: ABCD Assessment*.

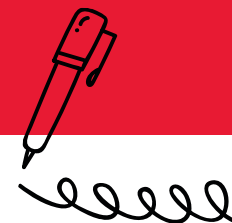
## Step 04 Delivery of Solutions

Finally, you will assess how you deliver solutions/products to your customers which can go beyond the MVP to create a USP. Not only a sturdy, resilient delivery strategy is necessary to support scale-up but also to increase resilience in the face of adversities, such as unforeseen crises like the COVID-19 pandemic. During this step you will focus on production/ processes, product development (R&I), marketing and communication, and logistics delivery; and you will identify if you offer solution that is unique and innovative.

Assess your solutions delivery in the final part of the *Worksheet: ABCD Assessment* and visualise the results from the 4 steps in the spider chart at the end of the Worksheet by adding the result for each dimension.



# ABCD Organisational Capabilities Assessment



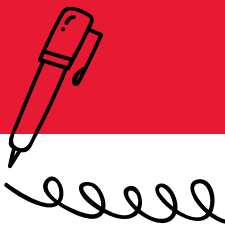
## Worksheet: ABCD Assessment

### Step 01

The score you give to each aspect depends on the answer, and it is shown right next to each answer option. Choose the option that best represents your current situation and register the score in the score box for each question.

Access to Markets		Score
1. How would you assess your current business growth rate and market share?	<ul style="list-style-type: none"><li>• High market share and high business growth rate <b>-3 points -</b></li><li>• Low market share and high business growth rate <b>-2 points -</b></li><li>• High market share and low business growth rate <b>-1 point -</b></li><li>• Low market share and low business growth rate <b>-0 points -</b></li></ul>	
2. To what extent has the enterprise identified the needs and problems of their current customers/beneficiaries, and understands their purchasing habits (frequency, motivation, quantities, location)?	<ul style="list-style-type: none"><li>• Completely <b>-3 points -</b></li><li>• Almost completely <b>-2 points -</b></li><li>• Partially <b>-1 point -</b></li><li>• Not identified <b>-0 points -</b></li></ul>	
3. To what extent has the enterprise identified unmet needs in other markets, and understands the customer segments in a new market?	<ul style="list-style-type: none"><li>• Very large extent <b>-3 points -</b></li><li>• Large extent <b>-2 points -</b></li><li>• Low extent <b>-1 point -</b></li><li>• We have not identified unmet needs and do not have an understanding of the customer segments <b>-0 points -</b></li></ul>	
4. How strong are the relationships between the organisation's staff and its customers?	<ul style="list-style-type: none"><li>• Very strong <b>-3 points -</b></li><li>• Strong <b>-2 points -</b></li><li>• Weak <b>-1 point -</b></li><li>• There are no existing relationships <b>-0 points -</b></li></ul>	
Total Score		

# ABCD Organisational Capabilities Assessment



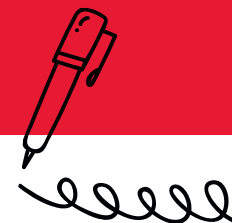
## Worksheet: ABCD Assessment

### Step 02

The score you give to each aspect depends on the answer, and it is shown right next to each answer option. Choose the option that best represents your current situation and register the score in the score box for each question.

Build Team Capacities		Score
1. How would you rate your organisation's leader(s)' management skills to steer the enterprise and scale it?	<ul style="list-style-type: none"><li>• Excellent skills <b>-3 points -</b></li><li>• Good skills <b>-2 points -</b></li><li>• Acceptable skills <b>-1 point -</b></li><li>• Low skills <b>-0 points -</b></li></ul>	
2. To what extent is your enterprise team flexible and able to adjust to unforeseen situations?	<ul style="list-style-type: none"><li>• Very large extent <b>-3 points -</b></li><li>• Large extent <b>-2 points -</b></li><li>• Low extent <b>-1 point -</b></li><li>• Very low extent <b>-0 points -</b></li></ul>	
3. How would you assess the staff's necessary skills and experience to carry out the enterprise's operations and scaling?	<ul style="list-style-type: none"><li>• Excellent skills <b>-3 points -</b></li><li>• Good skills <b>-2 points -</b></li><li>• Acceptable skills <b>-1 point -</b></li><li>• Low skills <b>-0 points -</b></li></ul>	
4. How easily can new competencies e.g. in recruiting local teams, managing central services, etc. be required?	<ul style="list-style-type: none"><li>• Very easily <b>-3 points -</b></li><li>• Easily <b>-2 points -</b></li><li>• Hard <b>-1 point -</b></li><li>• Very hard <b>-0 points -</b></li></ul>	
Total score		

# ABCD Organisational Capabilities Assessment



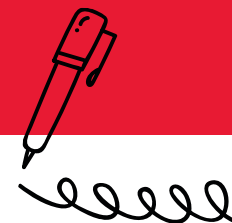
## Worksheet: ABCD Assessment

### Step 03

The score you give to each aspect depends on the answer, and it is shown right next to each answer option. Choose the option that best represents your current situation and register the score in the score box for each question.

Create Linkages		Score
1. How would you assess the cost-benefit of your current stakeholder relations (formal or informal)?	<ul style="list-style-type: none"> <li>Require low effort and we obtain high value <b>-3 points -</b></li> <li>Require high effort but we obtain high value <b>-2 points -</b></li> <li>Require low effort and we obtain low value <b>-1 point -</b></li> <li>Require high effort and we obtain low value <b>-0 points -</b></li> </ul>	
2. How ready are your partners (business/finance partners and support organisations) to support your organisation in the face of crises?	<ul style="list-style-type: none"> <li>Linkages are strong and partners are able to support during crises <b>-3 points -</b></li> <li>Linkages are strong but partners are heavily affected during crises <b>-2 points -</b></li> <li>Linkages are weak and partners cannot meaningfully support the enterprise during crises <b>-1 point -</b></li> <li>The enterprise does not have linkages and relies on own resources <b>-0 points -</b></li> </ul>	
3. Have you done a risk analysis with your relationships?	<ul style="list-style-type: none"> <li>We have identified the risks, monitor them and have identified mitigation strategies <b>-3 points</b></li> <li>We have identified the risks and monitor them, but no mitigation strategies are in place <b>-2 points -</b></li> <li>We have identified the risks but don't monitor them <b>-1 point -</b></li> <li>We have not identified the risks <b>-0 points -</b></li> </ul>	
4. How would you rate your stakeholders' and partners' (formal and informal) willingness to take action in the target market and scaling process?	<ul style="list-style-type: none"> <li>Very high <b>-3 points -</b></li> <li>Sufficient <b>-2 points -</b></li> <li>Acceptable <b>-1 point -</b></li> <li>Low <b>-0 points -</b></li> </ul>	
Total Score		

# ABCD Organisational Capabilities Assessment



## Worksheet: ABCD Assessment

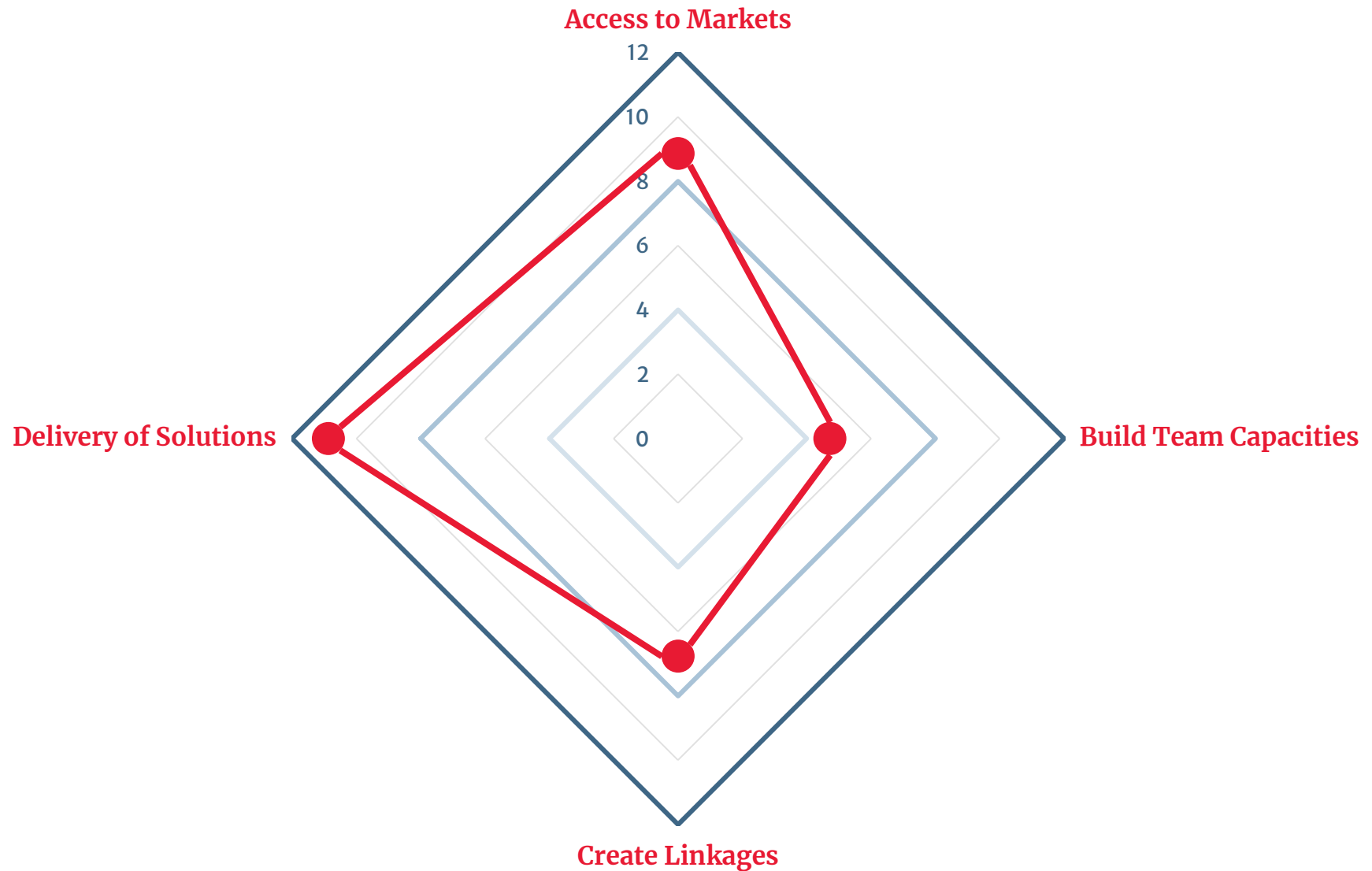
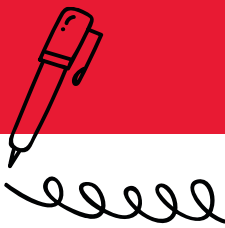
### Step 04

The score you give to each aspect depends on the answer, and it is shown right next to each answer option. Choose the option that best represents your current situation and register the score in the score box for each question.

Delivery of Solutions		Score
1. Product Development – How would you assess the current level of the product/ service innovation currently offered?	<ul style="list-style-type: none"> <li>The product/ service offers transformations and augmentations for the future offering, which surprise customers in future uses (potential product). <b>-3 points -</b></li> <li>The product/ service offers variations, extra features, or services that help differentiate the product / service from its competitors (augmented product). <b>-2 points -</b></li> <li>The product / service offers the set of features that the customers expect when they buy the product/ service beyond a generic product (expected product). <b>-1 point -</b></li> <li>The product/ service is a basic version made up of only those features necessary for it to function (generic product). <b>-0 points -</b></li> </ul>	
2. Production – How would your current internal processes (manufacturing or internal operations)?	<ul style="list-style-type: none"> <li>Well documented processes and quality systems are well established and used <b>-3 points -</b></li> <li>Processes and quality assurance systems are informally established and somewhat followed <b>-2 points -</b></li> <li>Some processes and some quality assurance measures are established but not followed <b>-1 point -</b></li> <li>No official processes and no monitoring of their quality <b>-0 points -</b></li> </ul>	
3. Marketing and communication – How well have you established a marketing and communication strategy?	<ul style="list-style-type: none"> <li>Marketing plan is well established and followed <b>-3 points -</b></li> <li>Marketing plan is somewhat established and partially followed <b>-2 points -</b></li> <li>Marketing is included in the operational plan and a few activities are carried out <b>-1 point -</b></li> <li>No marketing plan is established <b>-0 points -</b></li> </ul>	
4. To what extent does your operational plan include the plan for logistics of delivery?	<ul style="list-style-type: none"> <li>There is a well established and documented logistics plan in place, and is followed thoroughly <b>-3 points -</b></li> <li>Partially established procedures and followed thoroughly <b>-2 points -</b></li> <li>There are insufficient or outdated procedures <b>-1 point -</b></li> <li>There is no logistics plan in place <b>-0 points -</b></li> </ul>	
Total Score		

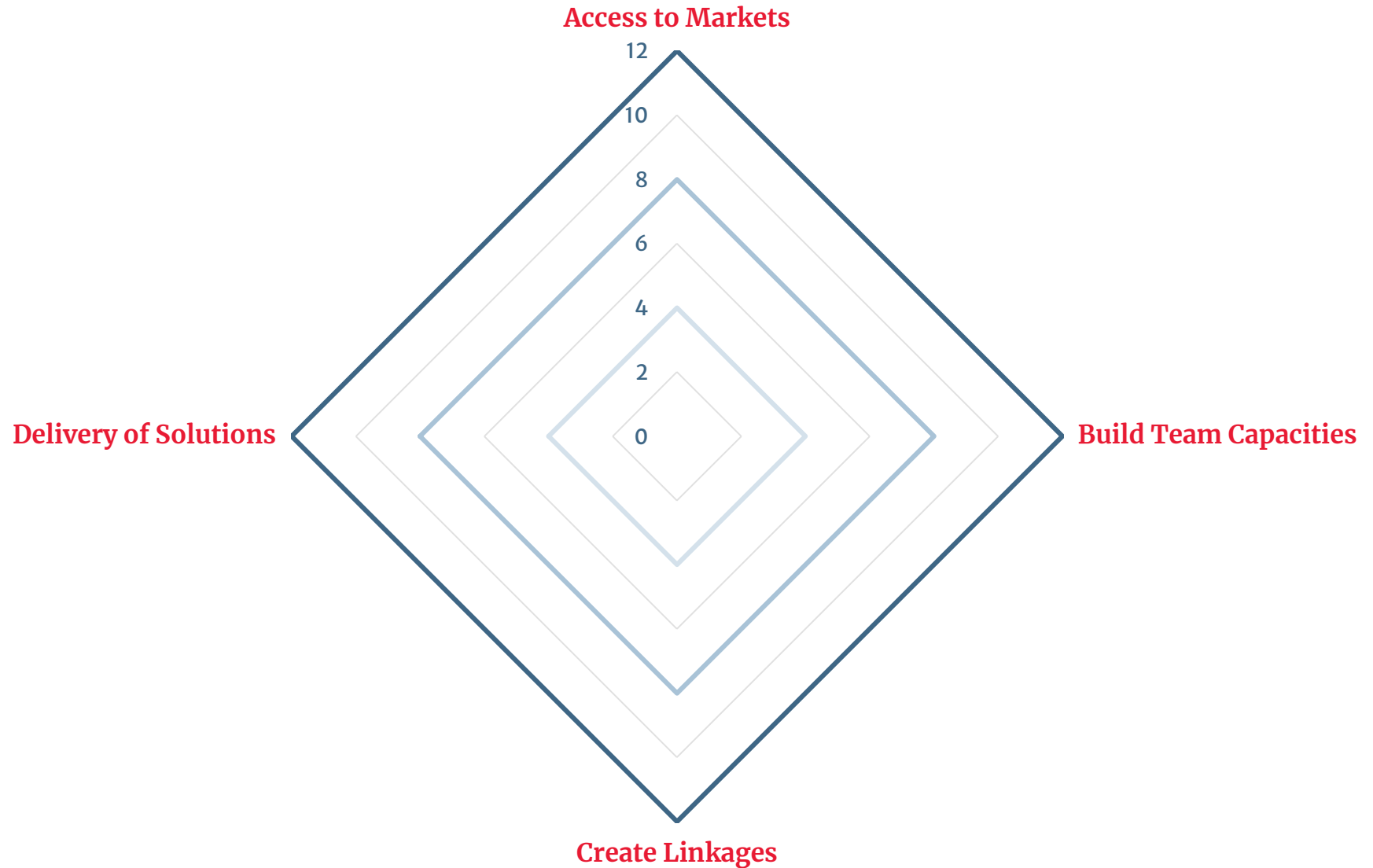
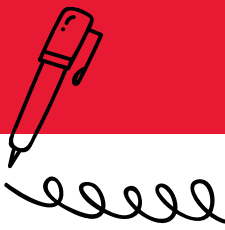
# ABCD Organisational Capabilities Assessment

## Worksheet: ABCD Assessment - Example



# ABCD Organisational Capabilities Assessment

## Worksheet: ABCD Assessment



# ABCD Organisational Capabilities Assessment

## Step 05 Organisational Capabilities Action Plan

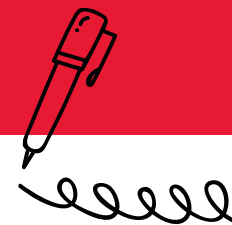
Now that you have assessed your **ABCD**, it is time to prioritise the areas which need improvement to achieve scaling readiness. Additionally, you need to develop an action plan to carry out the activities that will allow you to improve your organisational capabilities and become scale-up ready.

For this step, the visualisation in the spider chart in the previous step will help you to prioritise the two areas with the lowest scores to then think about the activities you need to carry out to achieve a higher score (3). Focus on the two lowest-rated dimensions, or on those which have achieved a score lower than 6.

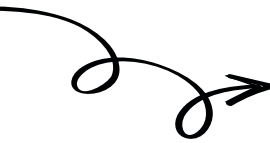
Next, list the lower rated items for each block on which you will focus (A, B, C, or D), these are the ones which require immediate action. For this, go back to the assessment and check which were the concrete questions that got the lowest score. Continue listing the activities needed to improve this item, all the resources needed, the responsible person(s) and the time by when you wish to achieve each activity.

- Complete the spider chart and then the required action plan in the *Worksheet: ABCD Action Plan* in the following pages. Consider short-term and long-term activities or action points.

# ABCD Organisational Capabilities Assessment



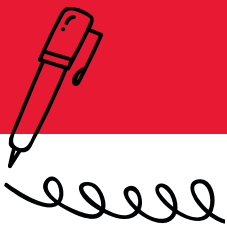
## Worksheet: ABCD Action Plan – Example



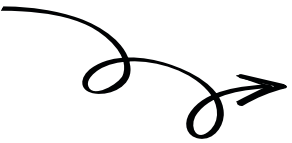
Dimension	Activity (long-term / short-term)	Resources	Responsible(s)	Timeframe
<b>A</b> Access to Markets				
<b>B</b> Build Team Capacities	<i>Training in change management – short-term</i>	<i>expert in change management</i>	<i>HHRR leader</i>	<i>6 months</i>
	<i>Create traineeship program to increase available skills – long-term</i>	<i>Technical education services institution</i>	<i>HHRR leader</i>	<i>1 year</i>
<b>C</b> Create Linkages	<i>Establish risk monitoring system – short-term</i>	<i>commercial leader</i>		<i>2 months</i>
	<i>Monitor risks regularly – long-term</i>	<i>commercial leader and staff</i>		<i>Every month</i>
<b>D</b> Delivery of Solutions				



# ABCD Organisational Capabilities Assessment



## Worksheet: ABCD Action Plan



Dimension	Activity (long-term / short-term)	Resources	Responsible(s)	Timeframe
<b>A</b> Access to Markets				
<b>B</b> Build Team Capacities				
<b>C</b> Create Linkages				
<b>D</b> Delivery of Solutions				

# Financial Readiness Assessment

# Financial Readiness Assessment

## When?

Having a clear and systematic approach to financial management is key to successfully measure and track the financial performance of an organisation and to grow the enterprise. By guiding you through the 4 most essential financial areas, this tool will point out avenues to advance the financial management capacity of the organisation and prepare solutions for the risk associated to unmanaged finances.

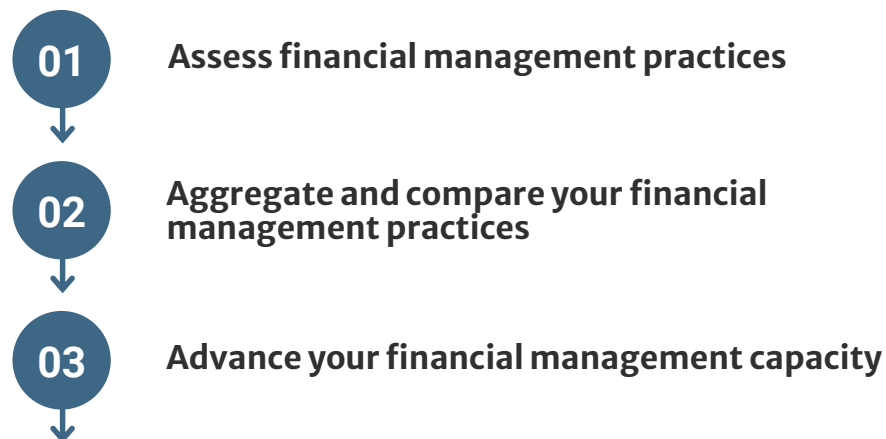
## What?

This tool provides a structured method for the enterprise to review their current financial management set-up. Developed as a self-assessment, it supports your organisation to identify the level of existing financial management systems and capabilities, and brainstorm solutions to improve on existing systems.

## How?

The tool is best applied in a team brainstorming to help improve financial management strategies during the COVID-19 crisis, and to tackle finance risks with agile solutions. You assess the financial management practices, providing scores from 0-3 points for each question, adding up to a total score for each area of financial management (max. 15 points). In the last step, you reconcile all area scores into a table, which will enable you to compare your level of advancement between these 4 areas and brainstorm the solutions to further advance your financial management capacity by mitigating risks.

## Steps



## Key outcomes

- **Better understanding of the current status of your organisation's financial management strategies and capabilities**
- **Discovering potential to further advance financial management practices**

# Financial Readiness Assessment

## Step 01

### Assess financial management practices

#### Part A: Cost controlling and price setting

In the first part of the self-assessment, you look at the current cost controlling and pricing practices of your organisation. Costs represent one of the two key determinants of the profits of an enterprise next to revenues. In turn, the price of your products is closely connected to revenues. For a successful enterprise, it is thus important to understand the nature of its costs, set adequate prices, analyse their development over time, and explore ways to reduce costs and adapt prices.

#### Part B: Budget and cash flow management practices

In the second part of the self-assessment, you look at budget and cash flow management.

Budgets provide an overview over planned expenditures and revenues for a certain period of time. Comparing planned budgets with actual numbers reveals where expectations were met or exceeded, which provides insights to improve future business planning and outcomes.

Furthermore, each enterprise should produce a cash flow statement at least once a year including an overview of the current cash flow situation and a forecast to prevent cash shortages.

## Step 02

### Aggregate and compare your financial management practices

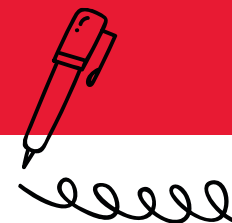
Aggregate and rank the score for financial management strategies from step 01: controlling costs; setting prices; managing budgets; managing cash flows. The score ranking goes from 1, the best score, to 4, the worst score. Identify the risk associated with the worst scored financial management strategy if the issue is unresolved.

## Step 03

### Advance your financial management capacity

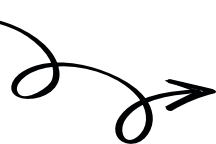
In this step, create an action plan to cut costs, manage budgets and cash flows to improve financial management across the four financial management categories (i.e. controlling costs; setting prices; managing budgets; managing cash flows). First, list the financial management strategy that requires risk management. Second, list ideas for risk management, next steps in implementing the solutions, the resources needed, the timeline to implement, and the goal for the next steps to implementing the risk management strategy.

# Financial Readiness Assessment



## Worksheet: Assess financial management practices

### Part A: Cost controlling & price setting



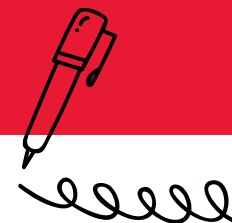
In the first part of the self-assessment you look at the current cost controlling and pricing practices of your organisation. Costs represent one of the two key determinants of the profits of an enterprise besides revenues. In turn, the prices of your products are closely related to revenues. For a successful enterprise, it is thus important to understand the nature of its costs, set adequate prices, analyse their development over time, and explore ways to reduce costs and adapt prices.

#### Step 01

Controlling costs	Score: _____
Do you have policies or guidelines for controlling costs, e.g. related to procurement, checklists for reducing costs, in your enterprise?	<div><div>0</div><div>1</div><div>2</div><div>3</div></div> <div>No policiesVerbal policiesInsufficient or outdated policiesAdequate written policies</div>
Do you keep records of the development of costs (direct and indirect, variable and fixed costs)?	<div><div>0</div><div>1</div><div>2</div><div>3</div></div> <div>No recordsLimited, outdated or incomplete recordsPartially outdated or incomplete recordsUpdated and complete records</div>
Do you set and update cost standards (i.e. expected costs for your products)?	<div><div>0</div><div>1</div><div>2</div><div>3</div></div> <div>NoFor some products irregularlyFor all products irregularlyFor all products regularly</div>
Do you compare cost standards (expected costs) with actual costs?	<div><div>0</div><div>1</div><div>2</div><div>3</div></div> <div>NoFor some products irregularlyFor all products irregularlyFor all products regularly</div>
Do you take action to reduce costs like buying large volumes to realize volume discounts or compare prices and negotiate with suppliers?	<div><div>0</div><div>1</div><div>2</div><div>3</div></div> <div>NoFor some productsFor many productsFor many products + renegotiations</div>

Setting prices	Score: _____
Do you have policies or guidelines for setting and regularly reviewing prices in your enterprise?	<div><div>0</div><div>1</div><div>2</div><div>3</div></div> <div>No policiesVerbal policiesInsufficient or outdated policiesAdequate written policies</div>
Do you keep records of the development of your prices by products/services?	<div><div>0</div><div>1</div><div>2</div><div>3</div></div> <div>No recordsLimited, outdated or incomplete recordsPartially outdated or incomplete recordsUpdated and complete records</div>
Do you set your prices?	<div><div>0</div><div>1</div><div>2</div><div>3</div></div> <div>No mechanismCost plus mark-upBased on competitorsBased on customers willingness to pay</div>
Do you offer your products at different prices for different customer segments?	<div><div>0</div><div>1</div><div>2</div><div>3</div></div> <div>NoVolume discountsOther meansVolume discounts + other means</div>
Do you decrease/increase your prices?	<div><div>0</div><div>1</div><div>2</div><div>3</div></div> <div>NoWhen costs changeWhen competitors change pricesWhen demand changes</div>

# Financial Readiness Assessment



## Worksheet: Assess financial management practices

### Part B: Budget and cash flow management practices

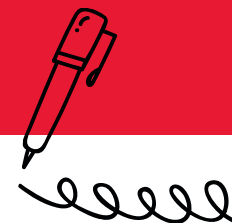
#### Step 01

In the second part of the self-assessment you look at budget and cash flow management. Budgets provide an overview over planned expenditures and revenues for a certain period of time. Comparing planned budgets with actual numbers reveals where expectations were met or exceeded which provides insights to improve future business planning and outcomes. Further, each enterprise should produce a cash flow statement at least once a year including an overview of the current cash flow situation and a forecast to prevent cash shortages.

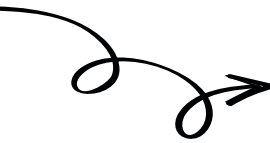
Managing budgets	Score: _____		
Do you have policies or guidelines for working with and managing budgets, e.g. for writing or approving budgets?			
0 No policies	1 Verbal policies	2 Insufficient or outdated policies	3 Adequate written policies
Which system does your enterprise use to prepare budgets?			
0 No system	1 Guidelines or hardcopy templates	2 Computer templates	3 Software
Do you compare your budgets with actual expenditures and income?			
0 No budgets are prepared	1 Never	2 Irregularly	3 After each budgeting period
How good would you say is your enterprise in meeting its planned sales and costs targets?			
0 Not applicable	1 Poor	2 Average	3 Good
Do you use budgets to calculate profit margins for your products?			
0 No budgets are prepared	1 Never	2 For individual products	3 For individual products and the whole enterprise

Managing cash flows	Score: _____		
Do you have policies or guidelines for cash flow management, e.g. on cash reserves, actions to identify and prevent cash shortages?			
0 No policies	1 Verbal policies	2 Insufficient or outdated policies	3 Adequate written policies
On which time basis do you portray your cash flows?			
0 No records	1 For each year	2 For each quarter	3 For each month
How far do your cash flow forecasts look ahead?			
0 No forecasts	1 One month	2 One quarter	3 More than one year
In the past, have you experienced cash shortages?			
0 Often	1 A few times	2 Once	3 Never
Do you know how high your working capital (i.e. money that you can mobilize quickly) is?			
0 No	1 Rough idea	2 Good idea	3 Regularly analyse development

# Financial Readiness Assessment

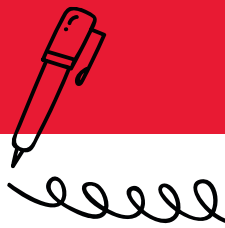


## Worksheet: Aggregate and compare your financial management practices - Example

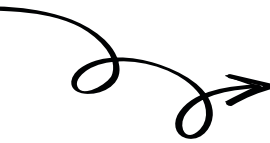


Step 02	Financial management strategy	Score (15 max. for each category)	Ranking (Best score is 1 and worst score is 4)	Risk identification
	Controlling costs	12	1	<ul style="list-style-type: none"><li>- Suppliers aren't willing to negotiate on material prices</li><li>- High costs in producing solar irrigation systems</li></ul>
	Setting prices	11	2	<ul style="list-style-type: none"><li>- Only price development for certain products, not all</li><li>- Pricing doesn't match with customers' willingness to pay</li></ul>
	Managing budgets	10	3	<ul style="list-style-type: none"><li>- Main expenses are not organised to calculate the acquisition costs for material, facilities, assistants</li></ul>
	Managing cash flows	11	2	<ul style="list-style-type: none"><li>- High investment costs for solar irrigation systems which affects cash flows</li></ul>

# Financial Readiness Assessment



## Worksheet: Aggregate and compare your financial management practices

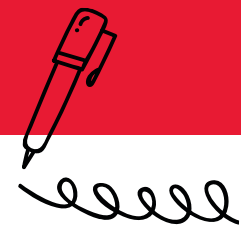


**Step 02**

Financial management strategy	Score (15 max. for each category)	Ranking (Best score is 1 and worst score is 4)	Risk identification
Controlling costs			
Setting prices			
Managing budgets			
Managing cash flows			



# Financial Readiness Assessment

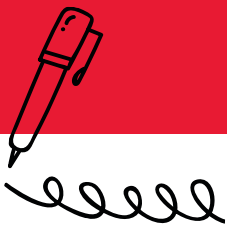


## Worksheet: Advance your financial management capacity - Example

Step 03

Financial management strategy	Risk mitigation idea	Next step	Resources needs to implement idea	Timeline	Goal for the risk mitigation idea
<b>Controlling costs</b>	<ul style="list-style-type: none"> <li>- Negotiate with suppliers on lowering costs of production</li> <li>- Better policies and systems on procurement</li> </ul>	<ul style="list-style-type: none"> <li>- Find other suppliers willing to negotiate</li> <li>- Develop adequate written policies on procurement</li> </ul>	Market researcher	4 months	Control cost with better procurement policies
<b>Setting prices</b>	Track price development for drip irrigation, ground sprayer, and solar irrigation pumps	Organize and compile price development for all products	Develop loan models in cooperation with local finance institutions to assist the farmers in bearing the installation costs of irrigation pump	6 months	Set prices based on customer's willingness to pay and is manageable for enterprise
<b>Managing budgets</b>	Analyse and find ways to manage acquisition cost for solar drip which is expensive	Organize main expenses to better budget for acquisition costs of drip irrigation systems- material, facilities, and capacity trainings for assistants	Information on product costs, information on actual expenditures and income	6 months	Reach planned sales and costs targets
<b>Managing cash flows</b>	Need to lower investment costs in production to increase cash flows	Research cost reduction strategy in the solar irrigation value chain	Increase database to compare prices of solar irrigation parts for production	ongoing	Find solutions to relieve cash shortages that still ensures good quality products

# Financial Readiness Assessment



## Worksheet: Advance your financial management capacity



**Step 03**

Financial management strategy	Risk mitigation idea	Next step	Resources needs to implement idea	Timeline	Goal for the risk mitigation idea
Controlling costs					
Setting prices					
Managing budgets					
Managing cash flows					

# Persona-Based Service Delivery

# Persona Based Service/Product Delivery

## When?

Before diving deeper into establishing a marketing strategy or plan to deliver your products/services, your enterprise should know your (potential) customers inside out. You can use this tool to guide you in understanding your customer “personas” and adapting your product/service delivery accordingly.

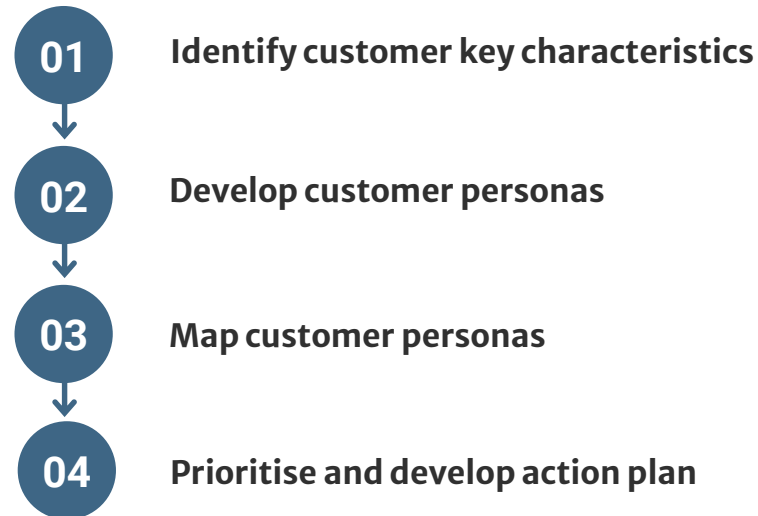
## What?

Customers are at the centre of every successful business. Most enterprises serve different customer groups that share certain characteristics. Creating customer “personas” eases your process of identifying the characteristics of these groups, and allows you to prioritise different groups and tailor your product or service better.

## How?

Sit down with your team to think about what customer characteristics are most important to shape your product/service delivery and separate your (potential) customers into groups. Once you have identified the customer “personas”, you can design a targeted strategy to better reach them and deliver your product/service. For this tool you should focus in one product or service you offer. But you can come back to it to develop it for further products/services.

## Steps



## Key outcomes

- Identification of different customer personas based on key characteristics
- Prioritisation of customer personas to be targeted for service/product delivery
- Setting and action plan for the targeted personas service/product delivery

# Persona Based Service/Product Delivery

## Step 01 Identify customer key characteristics

Your customers or end users may not be a homogenous group and therefore you may need different strategies to reach them and deliver your services/ products. For this, you should identify which are the key characteristics that determine your product/service delivery and develop different customer personas around them.

In this step, you will identify the key customer characteristics on which you wish to base your service/product delivery. The characteristics which can be used for developing your customer personas can be grouped in the following categories:

Demographics	Psychology	Behaviour
<ul style="list-style-type: none"><li>• Gender</li><li>• Age</li><li>• Ethnicity</li><li>• Location</li><li>• Education</li><li>• Occupation</li><li>• Income</li><li>• Marital status</li><li>• Family size</li></ul>	<p>Factors that are drivers of buying decisions (e.g. customers value greener products):</p> <ul style="list-style-type: none"><li>• Values and beliefs</li><li>• Motivations</li><li>• Hobbies</li><li>• Interests</li><li>• Lifestyle</li><li>• Attitudes</li></ul>	<p>Costumers' direct interactions with the business (e.g. customers buy your product or a substitute depending on which one is more easily available)</p> <ul style="list-style-type: none"><li>• Buying frequency and volume</li><li>• Loyalty</li><li>• Preferred distribution channel</li></ul>

These and similar questions will help you identify the key characteristics that determine your product/service delivery:

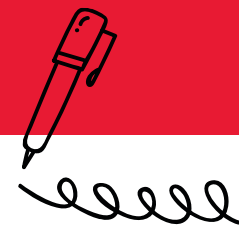
- What will influence the physical delivery of your product/service (long distances, rural or urban location, etc.)?
- Will customers with different incomes have different expectations and needs that differ from what your enterprise can offer?

- Will people with different educational levels understand your product/service differently?
- In the *Worksheet: Identify Key Characteristics*, discuss with your group about the importance of each of these characteristics and what they mean exactly to your enterprise, for example 'does location mean urban or rural, or distance from your premises?' In the first field in the worksheet select around 5 of the most important ones displayed here, and describe them in terms of what they mean to you. Then, rank them along with your team in terms of how important they are for your product/service delivery, and select the top two.
- For the two selected top characteristics, think about a scale or grouping (two or three levels or values) that would work for these characteristics. As exemplified before, location could be close-far, or rural-urban.

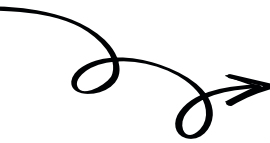
This analysis can be validated by a market assessment survey, although it is not required for this tool. You can conduct this survey at any other moment and come back to this tool to validate the key characteristics and your identified personas. For such assessment, consider the following:

- 1) Develop an assessment questionnaire that evaluates demand of the product/ service from consumers and various actors in the ecosystem, as well as their characteristics.
- 2) Conduct a feedback assessment of the product/ service parameters from consumers and other actors
- 3) Discuss with your team and compare to the initial personas developed and key characteristics determined.

# Persona Based Service/Product Delivery



## Worksheet: Identify Key Characteristics - Example



	Characteristic	What does this mean/imply for the enterprise?	Ranking
Demographics	Occupation	<i>It means the type of farmer, small, large or part of a collective</i>	1
	Age	<ul style="list-style-type: none"> <li>• young farmers, just above 18</li> <li>• experienced farmers leaders of collectives (more than 45 years old)</li> </ul>	4
Behaviour	Preferred distribution channel	<i>How farmers preferred to obtain the products</i>	3
Psychology	Values and Beliefs	<i>whether farmers value the ecological aspect of the products: solar technologies, over the price of products which use diesel</i>	2

**Top 1 Characteristic:** Occupation

**Value/ group:**

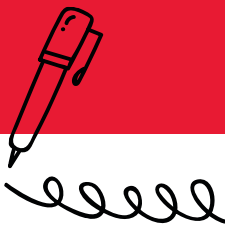
1. smallholder farmer
2. large farmer
3. farmer part of a collective

**Top 2 Characteristic:** Values and beliefs

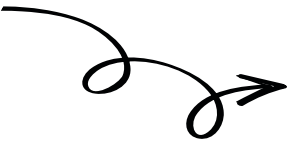
**Value/ group:**

1. environmentally conscious – prefers green products
2. values more a low price over the sustainability of the product
3. \_\_\_\_\_

# Persona Based Service/Product Delivery



## Worksheet: Identify Key Characteristics



	Characteristic	What does this mean/imply for the enterprise?	Ranking
Demographics			
Behaviour			
Psychology			

Top 1 Characteristic: \_\_\_\_\_

Value/ group: 1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

Top 2 Characteristic: \_\_\_\_\_

Value/ group: 1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

# Persona Based Service/Product Delivery

## Step 02 Develop customer personas

Now that you have identified the two key characteristics for your customer groups, you can start developing a persona profile. Understanding your customers from their own perspective is key to knowing how your enterprise can fulfil their needs; and designing a product/service delivery that people are willing and able to pay for.

In this step, you will step into your customer's shoes: What does he/she think, say, see, do, feel, and hear? It is easier to answer these questions when imagining a person or organisation that stands for each combination of key characteristics previously identified. In order to later map them, develop 4 or 9 personas depending on how many different groups you can identify.

- Write the name of that representative person or organisation in the Worksheet: Persona Profile. In addition, decide on a value for each of the two key characteristics identified in the previous step.
- Finally, complete the rest of the information presented: what frustrations does the persona face right now – what is his/her need? What goals does he/she have with your product or service? Think about what matters to the persona, and what he/she would like and not like.

### Relevant key questions for your customer persona profile

#### What does she/he see?

What kind of products/services does your customer look for in the market? Which ones does he/she see?

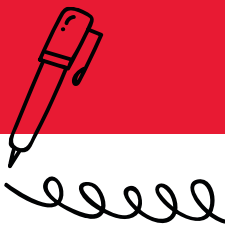
#### What motivates her/him?

What is she/he constantly trying to improve? What activities does she/he cherish doing? How does she/he spend their time?



# Persona Based Service/Product Delivery

## Worksheet: Persona profile- Example



**NAME:** Eva

**Key Characteristic 1:** Occupation: smallholder farmer

**Key Characteristic 2:** Values and beliefs: low price over sustainability

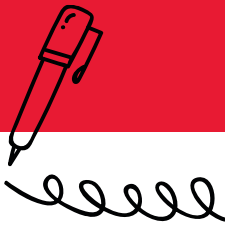
### FRUSTRATIONS AND NEEDS (what does he/she see and need?):

*More frequently affected by droughts, she is unable to provide for her family due to crop losses. Has been using some irrigation powered by diesel fuel, which has only slightly improved her productivity. The product is cheap, but sometimes she can't afford the diesel fuel.*

### GOALS AND MOTIVATIONS (what motivates her/him?):

*looking for sustainable source of multi-power energy, assessing clean energy options*

# Persona Based Service/Product Delivery



## Worksheet: Persona profile



NAME:

Key Characteristic 1: \_\_\_\_\_

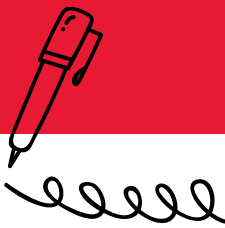
Key Characteristic 2: \_\_\_\_\_

FRUSTRATIONS AND NEEDS (what does he/she see and need?):

GOALS AND MOTIVATIONS (what motivates her/him?):

# Persona Based Service/Product Delivery

## Worksheet: Persona profile



NAME:

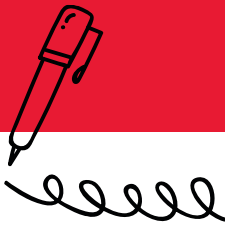
Key Characteristic 1: \_\_\_\_\_

Key Characteristic 2: \_\_\_\_\_

FRUSTRATIONS AND NEEDS (what does he/she see and need?):

GOALS AND MOTIVATIONS (what motivates her/him?):

# Persona Based Service/Product Delivery



## Worksheet: Persona profile



NAME:

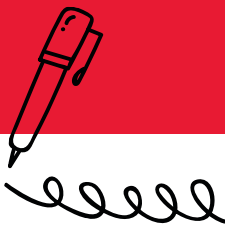
Key Characteristic 1: \_\_\_\_\_

Key Characteristic 2: \_\_\_\_\_

FRUSTRATIONS AND NEEDS (what does he/she see and need?):

GOALS AND MOTIVATIONS (what motivates her/him?):

# Persona Based Service/Product Delivery



## Worksheet: Persona profile



NAME:

Key Characteristic 1: \_\_\_\_\_

Key Characteristic 2: \_\_\_\_\_

FRUSTRATIONS AND NEEDS (what does he/she see and need?):

GOALS AND MOTIVATIONS (what motivates her/him?):

# Persona Based Service/Product Delivery

## Step 03 Map customer personas

Once you have developed your 4 or 9 customer personas it is time to map them to understand better how they fit with your two key characteristics for service/ product delivery, and how can you target each of your customer personas.

In the previous steps, you have identified the 2 key characteristics that are most important to you for your product/ service delivery. You have developed different personas around these 2 key characteristics as well, which allowed you to step into your customers' shoes to understand them better.

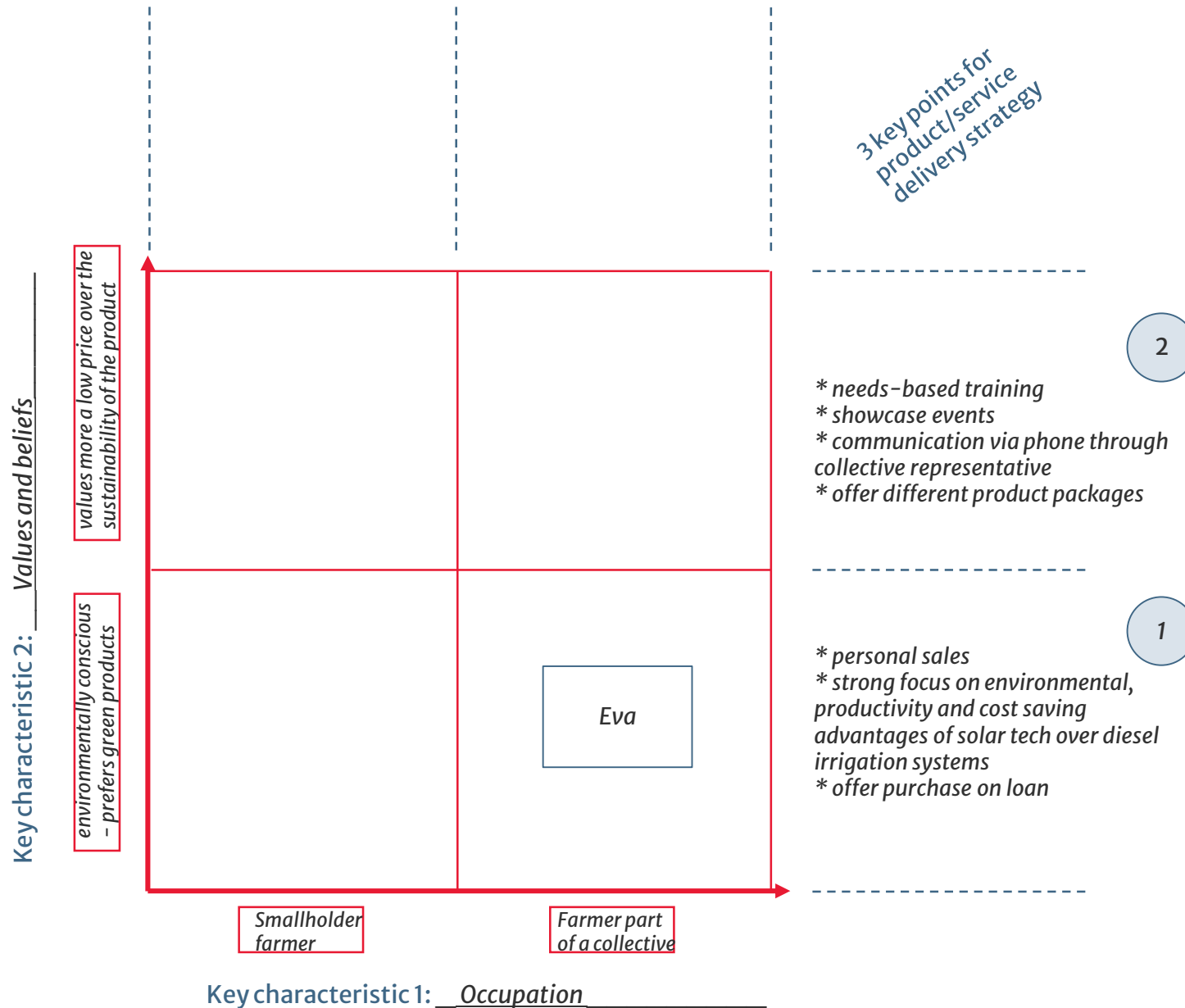
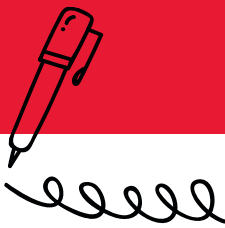
Now, you will map these customer personas in the matrix and outline product/service delivery strategies based on the two key characteristics. If you have developed 4 personas you would have 4 possible delivery strategies (2 for the vertical axis and 2 for the horizontal axis) – if you have developed 9 personas this would translate to 9 strategies. Focus on either the horizontal or vertical axis, meaning you would outline 2 (for 4 personas) or 3 (for 9 personas) strategies.

- In the *Worksheet: Customer persona mapping*, first insert the two key characteristics in the axes of the matrix, and the values or groups of each characteristic as you identified in step 01. Then, place your 4 or 9 customer personas developed according to the values of the key characteristics identified.
- Finally, group by either rows or columns (depending on which characteristic you want to further focus on) and outline a strategy for the product/service delivery. You don't need to detail it, as that will be a task for the next step. For this, you may think about the following:

- Is it a self-delivery, third-party delivery or will you be using distributors? For example, you can use self-delivery for customers in close proximity and third-party delivery for those located further away.
- Is it an online product service delivery strategy?
- How fast do your customers expect the product/service?
- How should the post-sale service and support look like?
- How should the communication with the customer be? For example, if one of your characteristics is educational level and you have profiled that a persona with a higher educational level prefers being contacted less regularly through email and one with lower education level prefers phone support, you should keep this in mind.
- Note down 2 or 3 key points to outline your product/ service delivery strategy. Don't forget to consider the persona profiling!

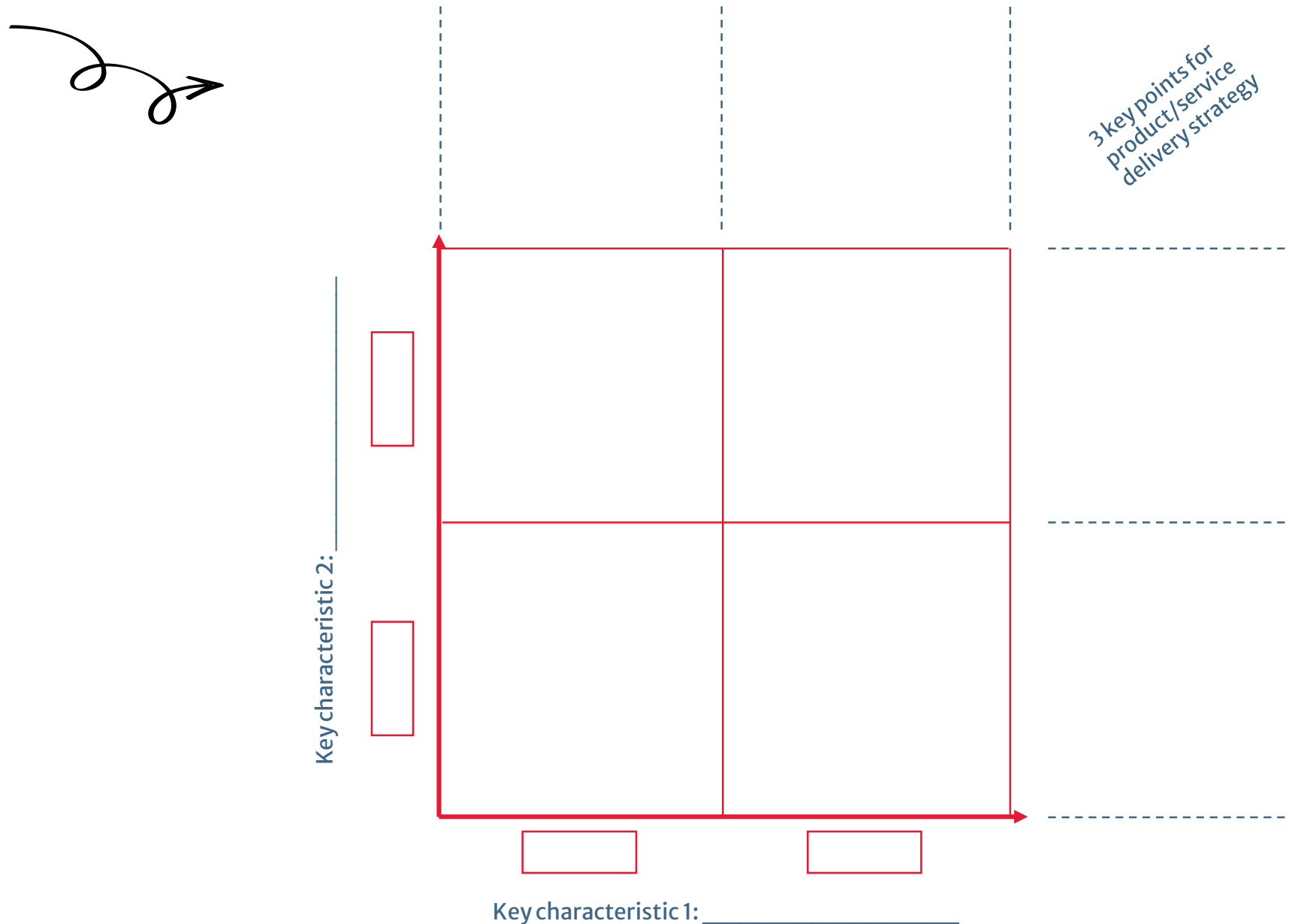
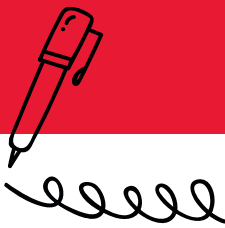
# Persona Based Service/Product Delivery

## Worksheet: Customer persona mapping – Example



# Persona Based Service/Product Delivery

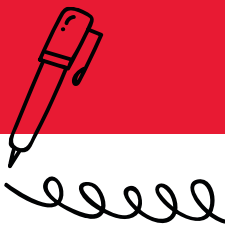
## Worksheet: Customer persona mapping – 4 personas





# Persona Based Service/Product Delivery

## Worksheet: Customer persona mapping – 9 personas



Key characteristic 2: \_\_\_\_\_


Key characteristic 1: \_\_\_\_\_

3 key points for product/service delivery strategy

# Persona Based Service/Product Delivery

## Step 04 Prioritise and develop action plan

In step 3 you have mapped your customer personas based on the 2 key characteristics for your enterprise's service/product delivery and have outlined 3 key points for the product/service delivery.

In this step you will further and detail your service/ product delivery strategy, as well as prioritise the customer personas to reach based on your available resources.

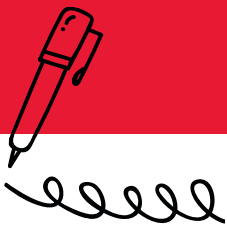
Develop an action plan for the 3 or 2 strategies outlined in the previous step. Detail your service/product delivery strategy with the activities, resources, responsible persons and timeframe to be implemented. Record your action plan in the *Worksheet: Action Plan*.

Based on this action plan, discuss with your team to prioritise 2 (for a 4 customer persona matrix) or 3 (for a 9 customer persona matrix) customer personas to target. Consider the resources you currently have and critically reflect on the feasibility of reaching the personas in your matrix. For example, if a key characteristic is distance, and you currently don't have own transportation or any means of contracting with a transport provider, you could prioritise the customers who are located closer to your premises. Highlight these customer personas which you want to prioritise.

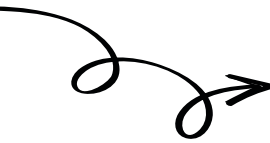
Remember that prioritising a specific set of customer personas does not mean that you will not or shall not target other groups.

The prioritisation is made based on current available resources, so you can come back to this tool every time your resources change and/or you want to develop new service/product delivery strategies to target another set of customer personas.

# Persona Based Service/Product Delivery

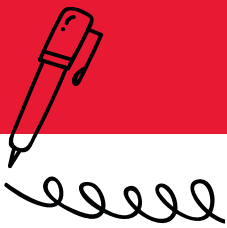


## Worksheet: Action plan - Example

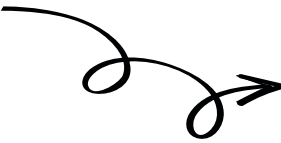


Product / service delivery strategy	Customer persona	Activities list	Resources needed	Responsible	Time-frame
1	Eva	<i>* door to door offering of the different products with demonstration and cost comparison * follow-up face to face * product sell * installation and training follow up support after 1 month and 3 months</i>	<i>* Product for demonstration * 1 community field assistant</i>	<i>* community field assistant</i>	<i>5 months</i>
2					

# Persona Based Service/Product Delivery



## Worksheet: Action plan



Product / service delivery strategy	Customer persona	Activities list	Resources needed	Responsible	Time- frame

# MVP Blueprint

# MVP Blueprint

## When?

This tool is needed after you gained an understanding of your small set of initial users customers and a first MVP with intentionally limited functionality. It serves to bring together the key components of creating an MVP 1 together on one page and think about what business aspects are crucial for MVP 1; what aspects you haven't consider yet; and what features should be left out for the first rendition of MVP 1 in the *MVP 1 Blueprint*. It will be tested and refined at the last step of this tool in the *MVP 2 Blueprint*.

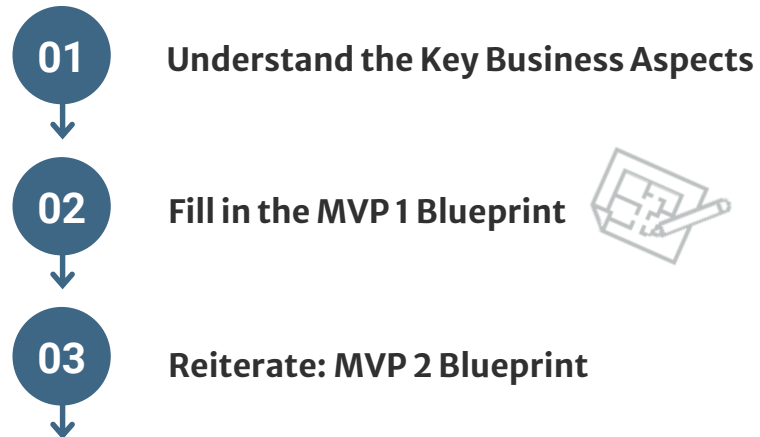
## What?

The MVP 1 is extremely fast to build within a couple of months to see if your product/service provides any value at all to your first set of users and solves the highest-order problem. The rest of the problems and additional functionalities are addressed in MVP 2. Therefore, understanding your customer and turning your business idea into a successful business model is crucial. The MVP Blueprint provides you with an overview of key business aspect and helps you identify which aspects are key for your enterprise to create value from the beginning and which aspects will only become important later. To increase COVID-19 resilience, this MVP Blueprint can be used to design products and services which corresponds to the new normal market situation and potential new customer groups.

## How?

This tool is best conducted in an open brainstorming session with your complete team to have an overview of your product or service, prepare a pitch, and provide feedback. You may consult your initial set of users about, such as friends and family, before you decide to build your MVP by providing the information that you have in this MVP Blueprint.

## Steps



## Key outcomes

- Understanding the key areas that create value in your enterprise
- Identifying key activities, processes and resources
- Developing the basics of your business model, prepare a pitch, and receive feedback

# MVP Blueprint

## Step 01 Understanding the Key Business Aspects

The MVP Blueprint consists of 11 key business aspects to consider in order to turn a MVP idea into a business model:

### → Problem

What are the top 3 problems your product/service solves for your target customers? What are the existing alternatives? Summarise the top 3 problems and list existing alternatives solving the problems.

### → Key Features

What are top 3 essential features of your product/service? Summarise the key benefits of your product/service. The features should be related to the problems presented.

### → Value Proposition

What makes your product/service different from existing solutions? Why should customers pay for/be interested in it? Describe the key features of your product or service in one catchy sentence.

### → Customers Acquisition Plan

What are the target customers segments? List the one to three key target customer segments. What is your messaging to the customers? What are the primary and secondary channels used to acquire the customers?

### → Pricing

At what price are you providing your offerings? If it is free of cost, how do you generate revenue? What is the unit margin? Unit margin here means selling price subtracted by cost of goods and customer acquisition cost. In case the unit margin is negative, how will the unit economics be validated, will it be through lowering cost of goods or customer acquisition cost? Does it cover overheads while factoring in the price of product/service?

### → Triple Bottom Line:

What are the key economic, social and environmental impacts? How does the product/service benefit the community, offer improvements for the environment or prevent environmental degradation? How does your product/service contribute to strengthen climate resilience? Points to consider include health, income, community coherence and women empowerment on the social side; water, energy, waste management and reduction of carbon emissions on the environmental side; and food security, water availability on the climate change adaptation side.

### → Timeline & Key Activities

What are the steps you need to take to produce your product/service and get it to customers? List the time it will take for each activity. The key steps for your enterprise depend on your value proposition.

### → Key Resources

What are the key resources for creating your value proposition? Think about machinery, retail store, trained workers etc.

### → Validation/ Assumptions

What are the key assumptions that you would like to validate from the MVP pilot? This can include lead conversion, sales /marketing, customer purchase behaviour, platform feedback.

### → Pitch Preparation

What is your development stage? Who are you presenting to and how much time do you have? What are you asking for?

### → Feedback

Review each key business aspects and put the check, cross, or question mark icons according to: 1) check the aspects which are completed; 2) write a cross mark in the aspect that should be let out; 3) write a question mark in aspects which needs more clarification. In addition, write overall feedback in this box.



# MVP Blueprint

## Step 02 Fill in the MVP 1 Blueprint

Now it is time to complete the MVP Blueprint:

- ✓ MVPs are extremely fast to build (within a period of 3–6 months depending on your product/service) and only solves the highest-order problem
- ✓ Always keep the initial customer group/users in mind and condense down what your initial users need
- ✓ Simplify, simplify, simplify the features for the first launch—keep it short and precise with limited functionality
- ✓ Do not worry if you cannot complete every field right now, some aspects are only important at later stages
- ✓ The MVP Blueprint is a living document, complete it with your current knowledge and be open to refining it at a later stage

Refer to [this link](#) to further your understanding of a MVP.

## Step 03 Reiterate: Implement the Feedback from the MVP 1 Blueprint by Filling in the MVP 2 Blueprint












In the *MVP 2 Blueprint*, you continue to improve your product or services after initial feedback from the MVP 1, you focus on more users' problems and more potential users. When thinking about MVP 2, you should think about customer retention and growth in customer numbers and target group. Once you have identified the customer numbers and target group, you can fill in the other key business aspects accordingly.

- ✓ Hold the problem you are solving tightly, hold the customer tightly, hold the solution you're building loosely
- ✓ Continue improving your solution until it actually solves the problem
- ✓ Include your product/service minimum industry/market benchmarks in business aspect 7: key activities to ensure that you are meeting your industry's standards

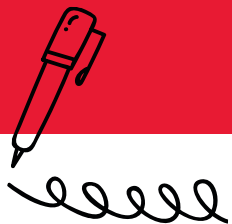


# MVP Blueprint

## Worksheet: MVP Blueprint 1 - Example

BUILD		
<b>1 Problem</b>  <p>Top 3 problems that the solar irrigation pump solve:</p> <ol style="list-style-type: none"> <li>1. low cost irrigation</li> <li>2. solar powered</li> <li>3. comes with installation service</li> </ol>	<b>2 Key Features</b>  <p>Top 3 features:</p> <ol style="list-style-type: none"> <li>1. community field assistants provide consultation on how to use irrigation kits</li> <li>2. customisation of solutions</li> <li>3. 5 year warranty</li> </ol>	<b>3 Value Proposition</b>  <p>Solar Irrigation Hub supplies and installs solar powered irrigation pumps which is low-cost, sustainable, and saves water.</p>
<b>4 Customers Acquisition Plan</b>  <ul style="list-style-type: none"> <li>- marketing through Facebook and TV ads</li> <li>- main messaging: cheaper than competitors, long term saves cost through renewable energy</li> </ul>	<b>5 Pricing</b>  <p>Solar-powered irrigation pumps (300 USD)</p>	<b>6 Triple Bottom Line</b>  <ol style="list-style-type: none"> <li>1. Social impact: 75% of marketing agents are women</li> <li>2. Environmental impact: saving water input with precision drips and solar powered engines</li> <li>3. Economic impact: low-cost</li> </ol>
<b>7 Timeline &amp; Key Activities</b>	<b>8 Key Resources</b>	<b>9 Validation/ Assumptions</b>  <ul style="list-style-type: none"> <li>- We would like to know whether the new MVP would lead to more sales as the pump would be cheaper</li> <li>- We would also like to know if our customers would enjoy the pump for longer with better material durability.</li> </ul>
PITCH		
<b>10 Pitch Preparation</b>  <p>Our solar irrigation pump MVP is at its beginning stage of development where we are researching for cheaper and more durable product. We would like to develop this new irrigation pump MVP to increase our customer group and to provide a stronger solar irrigation pump for low income farmers.</p>		
LEARN		
<b>11 Feedback</b>    <p>We have a clear and agreed on assumptions as an enterprise but we need more evidence based impact assessment.</p>		

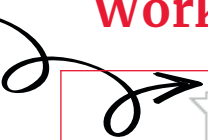
# MVP Blueprint



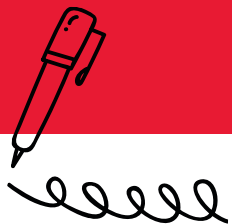
Step 01

## Worksheet: MVP Blueprint 1

BUILD		
1 Problem	2 Key Features	3 Value Proposition
4 Customers Acquisition Plan	5 Pricing	6 Triple Bottom Line
7 Timeline & Key Activities	8 Key Resources	9 Validation/ Assumptions
PITCH		
10 Pitch Preparation		
LEARN		
11 Feedback		



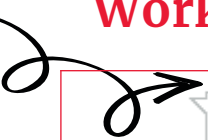
# MVP Blueprint



Step 02

## Worksheet: MVP Blueprint 2

BUILD		
1 Problem	2 Key Features	3 Value Proposition
4 Customers Acquisition Plan	5 Pricing	6 Triple Bottom Line
7 Timeline & Key Activities	8 Key Resources	9 Validation/ Assumptions
PITCH		
10 Pitch Preparation		
LEARN		
11 Feedback		



# Go-to-Market

# Go-to-Market

## When?

The *Go-to-Market* tool is used when you enter the market for the first time, add a new product or service or want to expand to new customers. This tool will compare the cost-effectiveness of each marketing channel for your product or service. As a result, the tool will allow you to increase COVID-19 resilience by marketing your product and services in relevant channels and save your business marketing costs.

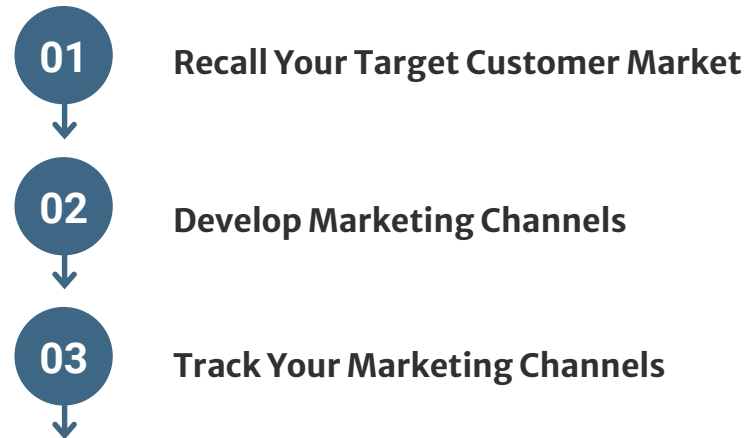
## What?

This tool helps you to develop and decide which Go-to-Market channel is most cost effective as you plan to bring your product or service to the market. In the first step, you review the target market. In the second step, you develop the marketing channels for your product or service by allocating budgets and determining the number of audiences for each channel. In the last step, you will quantitatively record your monthly cost and revenue for the marketing channels. The *Go-To-Market Monitor* is included as a spreadsheet in the toolkit annex and can be completed in Step 3 which will ultimately provide you with a 6-month cost-effectiveness analysis of the marketing channels.

## How?

For this tool you should be with your team, and in particular have the people working on marketing and distribution at the table. It may also make sense to invite your future distributors or customers. Make sure that you have all your data about your enterprise collected so far at hand.

## Steps



## Key Outcomes

- Refining and prioritising your target customer market
- Understanding which marketing channel is most effective for selling your products or services
- Tracking and quantifying your data to determine which marketing channels best fit your customers, your product/service and your business model

# Go-to-Market

## Step 01 Recall Your Target Customer Market

Decide on the target customer market(s) to whom you want to start selling your product.

Hone in on your target customer market(s) based on the following questions:

- **Who is the first customer you have in mind for your product?**
- **Who will be most attracted to your product's features and benefits? Whose problems do you solve best? Whose values are reflected most by your product or service?**
- **Who can be reached the easiest and quickest, bearing in mind your enterprise's resources?**

Other factors to determine your target customer market(s) are:

- **Demographic Characteristics:** Age, location, occupation
- **Psychographic Characteristics:** Hobbies, personal values, educational level
- **Behavioural Characteristics:** Location where the buyer purchases the products; the amount that the buyer purchases; propensity to spend

For the first launch of your product or service, select only 1 to 2 key target market segments. For these customer segments, think about the Unique Selling Point (USP) of the product for the customer segment.

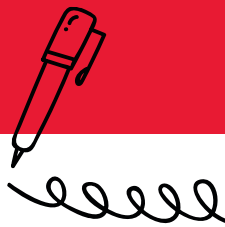
## Step 02 Develop Marketing Channels

Based on your understanding of your customers, it is now time to work on your marketing channels to track and quantify the success of each marketing channel.

In the *Go-to-Market Monitor* excel sheet, develop your marketing channels by listing the allocated budget and the overall audience targets.

1. List the online and offline marketing channels.
2. List the allocated budget for each marketing channel (i.e. Marketing Channel A, B, C) – there can be multiple marketing channels online or offline. Then, in the last row of the table, add the total allocated budget for all marketing channels.
3. Determine the overall target for your sales lead and new acquisitions per marketing channel for a period of 6 months. In the last row of the table, add the total sales lead target and the total new acquisitions target.

In the case of multiple marketing channels for a product, please feel free to add rows to the Develop Marketing Channels table in the *Go-to-Market Monitor* excel sheet.



## Worksheet: Recall Your Target Customer Market - Example

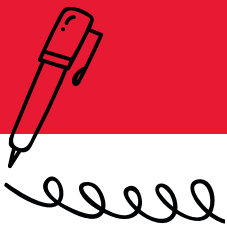
Identify which product/service items are ready to Go-To-Market based on the target customer market

### Step 01

Product/Service Items	Target Customer Market	Product USP for the customer segment
<ul style="list-style-type: none"><li>• <i>Drip: low pressure, precision irrigation, delivering water to the root (31 USD)</i></li><li>• <i>Ground sprayer: sprinkle directs water spray to the plant's base, ideal for high-value crops on small plots, like mango and beans (30 USD)</i></li><li>• <i>Solar-powered irrigation pumps: affordable solar-powered irrigation pump (300 USD)</i></li></ul>	<ul style="list-style-type: none"><li>• <i>Farmers that have more than 1 hectare of land</i></li><li>• <i>Farmers Collective</i></li></ul>	<ul style="list-style-type: none"><li>• <i>Eco-friendly solution that saves you time and increases your productivity by x%</i></li></ul>

### Guiding questions to determine the target customer market:

- Who is the first customer you have in mind for your product?
- Who will be most attracted to your product's features and benefits? Whose problems do you solve best? Whose values are reflected most by your product or service?
- Who can be reached the easiest and quickest, bearing in mind your enterprise's resources?



## Worksheet: Recall Your Target Customer Market

Identify which product/service items are ready to Go-To-Market based on the target customer market

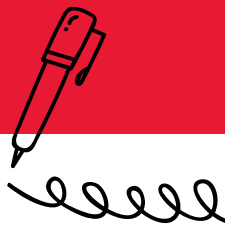
Step 01

Product/Service Items	Target Customer Market	Product USP for the customer segment

### Guiding questions to determine the target customer market:

- Who is the first customer you have in mind for your product?
- Who will be most attracted to your product's features and benefits? Whose problems do you solve best? Whose values are reflected most by your product or service?
- Who can be reached the easiest and quickest, bearing in mind your enterprise's resources?



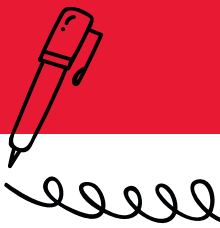


## Worksheet: Develop Your Marketing Channels - Example

Develop marketing budget and target

Step 02

	Allocated Budget (marketing channel as a new enterprise in the first 6 months)		Overall Target (Audiences reached per channel in 6 months)			
			Sales Lead		New Acquisitions	
<u>Marketing Channel A:</u>	Facebook: 7.400 USD		1.200		300	
<u>Marketing Channel B:</u>	TV advertisements: 7.200 USD		600		120	
<u>Marketing Channel C:</u>	Door-to-door marketing: 3.400 USD		480		90	
	Total allocated budget for all marketing channels	18.000	Total sales lead target for all marketing channels in 6 months	2.280	Total new acquisitions target for all marketing channels in 6 months	510



## Worksheet: Develop Your Marketing Channels

Develop marketing budget and target

Step 02

	Allocated Budget (marketing channel as a new enterprise in the first 6 months)		Overall Target (Audiences reached per channel in 6 months)			
			Sales Lead		New Acquisitions	
<u>Marketing Channel A:</u>						
<u>Marketing Channel B:</u>						
<u>Marketing Channel C:</u>						
	Total allocated budget for all marketing channels		Total sales lead target for all marketing channels in 6 months		Total new acquisitions target for all marketing channels in 6 months	

# Go-to-Market

## Step 03 Track Your Marketing Channels

Once you have selected the products and the marketing channels based on the target customer, in Step 3 you will track the budget needed for each marketing channel; sales leads; and new acquisitions for each month. In addition, you will also track the monthly revenue. You can then proceed to do a comparative analysis of the cost-benefits of each marketing channel with the example formula provided for in the “Baseline” column in the *Go-to-Market Monitor* excel sheet.

Key terms:

- A **sales lead** is a potential sales contact, individual or organisation that expresses an interest in your goods or services. Leads are typically obtained through the referral of an existing customer or through a direct response to advertising or publicity. A company's marketing department is typically responsible for lead generation.
- **New acquisitions** are the sales that were directly generated through this marketing channel.
- **Average Revenue per User** is the total revenue per month divided by the number of users.
- **Total sales and leads** with monthly revenue (ARPU and total) tracking for each channel.

Revenue Channels	Details	Baseline	Month-1
Channel-A	What is the primary channel?	Example- Facebook	
Total Budget of Channel A	Associated Cost and Budget Allocation to Channel A	1500	
# of leads generated from Channel A	Total Leads of channel A	200	
# of leads converted from Channel A	Total New Acquisition from channel A	50	
Channel-B	What is the secondary channel?	Example- TV advertisements	
Total Budget of Channel B	Associated Cost and Budget Allocation to Channel B	1000	
# of leads generated from Channel B	Total Leads of channel B	100	
# of leads converted from Channel B	Total New Acquisition from channel B	20	
Channel-C	What is the tertiary channel?	Example- Door-to-door marketing	
Total Budget of Channel C	Associated Cost and Budget Allocation to Channel C	500	
# of leads generated from Channel C	Total Leads of channel C	80	
# of leads converted from Channel C	Total New Acquisition from channel C	15	
Total accumulated outcome for all marketing channels			
	% of customer that ordered in channel A	58.82	
	% of customer that ordered in channel B	23.53	
	% of customer that ordered in channel C	17.65	
# of New customer acquired	Conversion from Channel A+Channel	85	
Average Order Value	Revenue divided number of orders. This is the average amount of money each customer spends per transaction.	120	
Average Revenue per user	Total revenue per month divided by the number of users.	600	
# of purchase per customer per month	Frequency of order per customer/per month	5	
# of orders per month	Purchase frequency * Customer Acquired	425	
Total Budget expense per month	Budget of Channel A+ Channel B+ Channel C	3000	
Total Revenue per month	# of order per month * Avg order value	51000	
Avg Customer Acquisition Cost	Total budget expense/# of new customer	35.29	

- Go to the excel file *Go To Market Monitor\** and fill in the required information. Keep in mind that fields in grey are calculated automatically



Go To Market  
Monitor

\* To request the *Go To Market Monitor* excel file, please contact [gutierrez@adelphi](mailto:gutierrez@adelphi) or [nirachatsuwan@adelphi.de](mailto:nirachatsuwan@adelphi.de)

# Diversifying Markets

# Diversifying Markets

## When?

This tool can either be used if the enterprise's business and/or growth strategy contemplates entering a new market, or at points in time that require the enterprise to access alternative markets, including external shocks such as a pandemic or climate change impacts. Beforehand, make sure to assess your organisational readiness for scale-up. Once you have your capacities and team in place to undertake a market diversification, this tool can guide you through the process.

## What?

This Diversifying Markets tool aims at outlining a distribution strategy and identify the partners you need when entering a new market. Market Diversification comprises Market Expansion and Market Development, and so this tool will guide you in identifying the product(s) for a new market, assessing potential markets, selecting the market diversification strategy, as well as outlining the distribution strategy.

## How?

This analysis and decision process can be done individually, but it is recommendable to work as a group involving all your team members from business strategy and/or marketing activities, since they are knowledgeable on the topic and can provide inputs about the markets, partners and products.

## Steps



## Key outcomes

- Defining and assessing the new market for the selected product(s)
- Outlining a distribution strategy and network by identifying steps and partners

# Diversifying Markets

## Step 01 Identify product(s) for new market

In order to identify the product(s) best suitable for market diversification, let's first define the 2 market diversification strategies:

- **Market Expansion** refers to selling existing products in geographical markets not previously served by the enterprise, maintaining the same or the existing target groups.
- **Market Development** also refers to selling existing products in new geographical markets, with the difference that the target groups are new and different from the existing ones.

Market diversification does not entail market penetration, it does not refer to gaining additional market share within the same customer segment and the same geographical location.

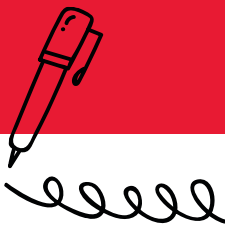
With these definitions in mind, in this step you will identify the product(s) that you want to introduce to the new market. Whether it is part of your growth strategy, or whether you are exploring new options stemming from decreased sales due to the COVID-19 pandemic, the following assessment will guide you in selecting the product(s) suitable for the new market.

The assessment of your product portfolio incorporates aspects of the Growth-Share Matrix by the Boston Consulting Group (market share and market growth rate, since a good performing product is a good indication of the potential performance of the product in a new market) and adds several internal factors related to the current situation of your organisation and production. This step helps in identifying the profitability of your products and the cost benefit when analysing the effort you have to put into selling the products, and the readiness of the product and production capacity of your organisation.

For this step, consider all your products and think about how each one currently performs in the existing market, and its current production and availability. You will assess the following factors:

- **Domestic market share:** the share of the product in the current market. Typically (but not always) products that currently sell well have a good chance of doing well in a new market.
  - **Domestic market growth:** the current growth of the market where you sell the product. Indicates if it is a growing or mature market.
  - **Production capacity / availability:** sufficient capacity available in-house to manufacture the product and/or the ability to source it is essential to expand or develop a new market.
  - **Product adaptability:** For the product to be successful in a new market, it needs to be easy to incorporate slight changes in its colour, size, packaging, etc. to appeal to the new market.
- In the *Worksheet: Identify Product*, assign a colour to each product in your portfolio. Then, for each product go through the assessment questions and answer each as low, medium or high. Set the matching colour of the product you are assessing where it corresponds.
- Select the product which has the highest diversification capability, that is the one with the most “highs”. In case the decision is not so clear, discuss with your team to narrow the selection to one product.

# Diversifying Markets



## Worksheet: Identify product - Example

Use the icon to rank your product(s) on the following dimensions from low to high. Select the product which has the highest diversification capability (most "highs")

### Domestic market share



### Domestic market growth



### Production capacity / availability



### Product adaptability



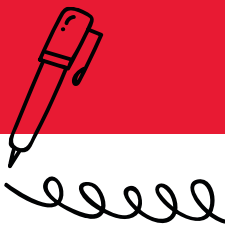
### Product Portfolio

- ☒ Product 1: Drip Irrigation
- ☒ Product 2: Ground sprayer
- ☒ Product 3: Solar irrigation pump
- ☒ Product 4: \_\_\_\_\_

### Product Selected:

Drip Irrigation

# Diversifying Markets



## Worksheet: Identify product

Use the icon to rank your product(s) on the following dimensions from low to high. Select the product which has the highest diversification capability (most “highs”)

Domestic market share

low medium high

Domestic market growth

low medium high

Production capacity / availability

low medium high

Product adaptability

low medium high

### Product Portfolio

- ☒ Product 1: \_\_\_\_\_
- ☒ Product 2: \_\_\_\_\_
- ☒ Product 3: \_\_\_\_\_
- ☒ Product 4: \_\_\_\_\_

### Product Selected:

\_\_\_\_\_



# Diversifying Markets

## Step 02 Target market analysis

After having identified the product to take to a new market, you now need to understand the market you are going to enter and assess its characteristics before you can actually bring your product there.

At this stage, you may be considering several potential markets to expand to or to develop. For this step, you must do some research about these potential markets you have in mind. This will aid you to select the most appropriate one to carry out your development or expansion strategy.

To analyse the potential markets, you will assess up to 3 options that you have in mind, considering the following criteria:

**Market growth and trends:** growth rate, stage of lifecycle (emerging, mature, declining)

**Competition:** threat of existing competitors, threat of new entrants, and threat of substitute products

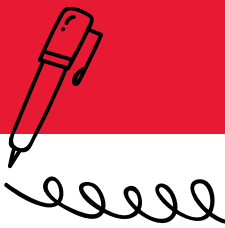
**Trade:** regulatory, certification and trade barriers

**Government institutions:** potential support from foreign government institutions

- Based on some research, complete the assessment in the *Worksheet* for each of the three potential markets you are considering.
- After you have completed the information for each, critically discuss along with your team members which one would be a better option to tap into and rank them. Finally, select the highest ranking market to continue defining your market diversification strategy.

# Diversifying Markets

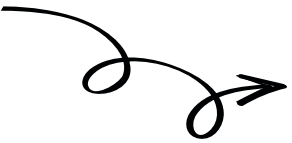
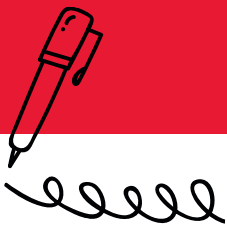
## Worksheet: Target Market Analysis – Example



Market Characteristic	Market 1 <i>neighbour country</i>	Market 2 <i>neighbour city</i>	Market 3 <i>neighbour region</i>
Market size	USD 12,000,000	USD 6,000,000	USD 4,000,000
Growth rate	6,5%	4%	5%
Stage of lifecycle (emerging, mature, declining)	<i>emerging</i>	<i>emerging</i>	<i>emerging</i>
Threat of existing competitors	<i>high</i>	<i>medium</i>	<i>low</i>
Threat of new entrants	<i>medium</i>	<i>high</i>	<i>low</i>
Threat of substitutes	<i>low</i>	<i>medium</i>	<i>Medium</i>
Regulatory, certification and trade barriers	<i>high</i>	<i>low</i>	<i>low</i>
Potential support from foreign government institutions	<i>high</i>	<i>medium</i>	<i>low</i>
Market Ranking	3	1	2

# Diversifying Markets

## Worksheet: Target Market Analysis



Market Characteristic	Market 1	Market 2	Market 3
Market size			
Growth rate			
Stage of lifecycle (emerging, mature, declining)			
Threat of existing competitors			
Threat of new entrants			
Threat of substitutes			
Regulatory, certification and trade barriers			
Potential support from foreign government institutions			
Market Ranking			

# Diversifying Markets

## Step 03 Select market diversification strategy

Now that you have assessed the potential markets and selected your new target market, you need to define your diversification strategy. As explained before, there are two possible ways to enter into the new market: through market expansion and market development.

In this step, you will decide whether to target the same customer segment in the new market or to target a new customer segment in this new market.

To develop this step, you will base your decision on a need-based segmentation. This means that you will consider how the selected product for the new market will cover the needs of other segments, different than the customer segment you already target.

- Do further research about the new market and think about 3 potential new customer segments and then complete the assessment in the *Worksheet: Market Diversification Strategy*. Name each of the 3 segments and answer yes or no to each question by thinking about how the selected product would perform in each customer segment.
- When you have completed the assessment, add the number of questions you answered with yes for each segment. If the resulting number is larger than 5 for any segment, you can decide for market development— otherwise you should choose market expansion.

## Step 04 Customer Analysis

If you have decided for a market development strategy, continue with this step to analyse the new customer segment. Otherwise, you may go directly into step 05.

To successfully reach a new customer segment, you must understand their characteristics and needs. In this step, you will focus on analysing the new customer segment, their demographics, needs, behavioural characteristics, etc. Understanding your new customer segment enhances communication and product delivery.

- In the *Worksheet: Customer Analysis*, consider your new customer segment and complete the customer segmentation characteristics: Geographical, Behavioural, Psychographics, Demographics.

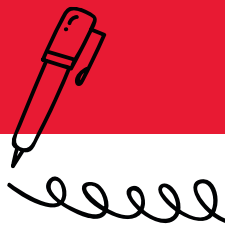
**Geographical:** Location, climate, land use

**Demographics:** age, gender, ethnicity, religion, marital status, income, and education level, occupation, family size

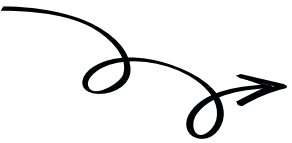
**Behavioural:** buying frequency and volume, special buying occasions, loyalty, most valued product/service (price, quality, convenience), preferred distribution channel

**Psychographics:** values, motivations, attitudes, and conscious or subconscious beliefs.

# Diversifying Markets



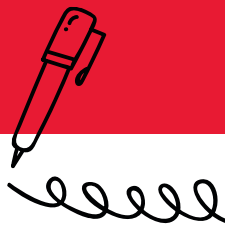
## Worksheet: Market diversification strategy - Example



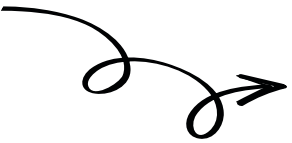
Product name: <u>Drip Irrigation</u>	Customer segment 1 <u>large farmers</u>	Customer segment 2 <u>farmer collectives</u>	Customer segment 3 <u></u>
	Yes/ No	Yes/ No	Yes/ No
The functionality of the product is able to solve the customer's problem	<i>no</i>	<i>No</i>	
The features of the product are worth the amount that the customer pay (price)	<i>Yes</i>	<i>Yes</i>	
The product's usage is convenient for the customer	<i>No</i>	<i>No</i>	
The customer's experience with the product is smooth and hassle free	<i>Yes</i>	<i>Yes</i>	
Customers can rely on the product every time they need it	<i>No</i>	<i>No</i>	
The product is compatible with other products or services they are using and/or customers can find the required products or services to ensure its functionality	<i>Yes</i>	<i>No</i>	
The customer has access to customer support regarding the product	<i>Yes</i>	<i>Yes</i>	
<b>Total "yes"</b>	<b>4</b>	<b>3</b>	

Market diversification strategy: Market expansion

# Diversifying Markets



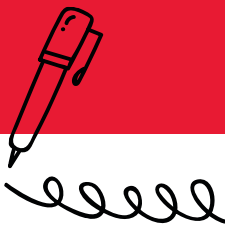
## Worksheet: Market diversification strategy



Product name: _____	Customer segment 1 _____	Customer segment 2 _____	Customer segment 3 _____
	Yes/ No	Yes/ No	Yes/ No
The functionality of the product is able to solve the customer's problem			
The features of the product are worth the amount that the customer pay (price)			
The product's usage is convenient for the customer			
The customer's experience with the product is smooth and hassle free			
Customers can rely on the product every time they need it			
The product is compatible with other products or services they are using and/or customers can find the required products or services to ensure its functionality			
The customer has access to customer support regarding the product			
Total "yes"			

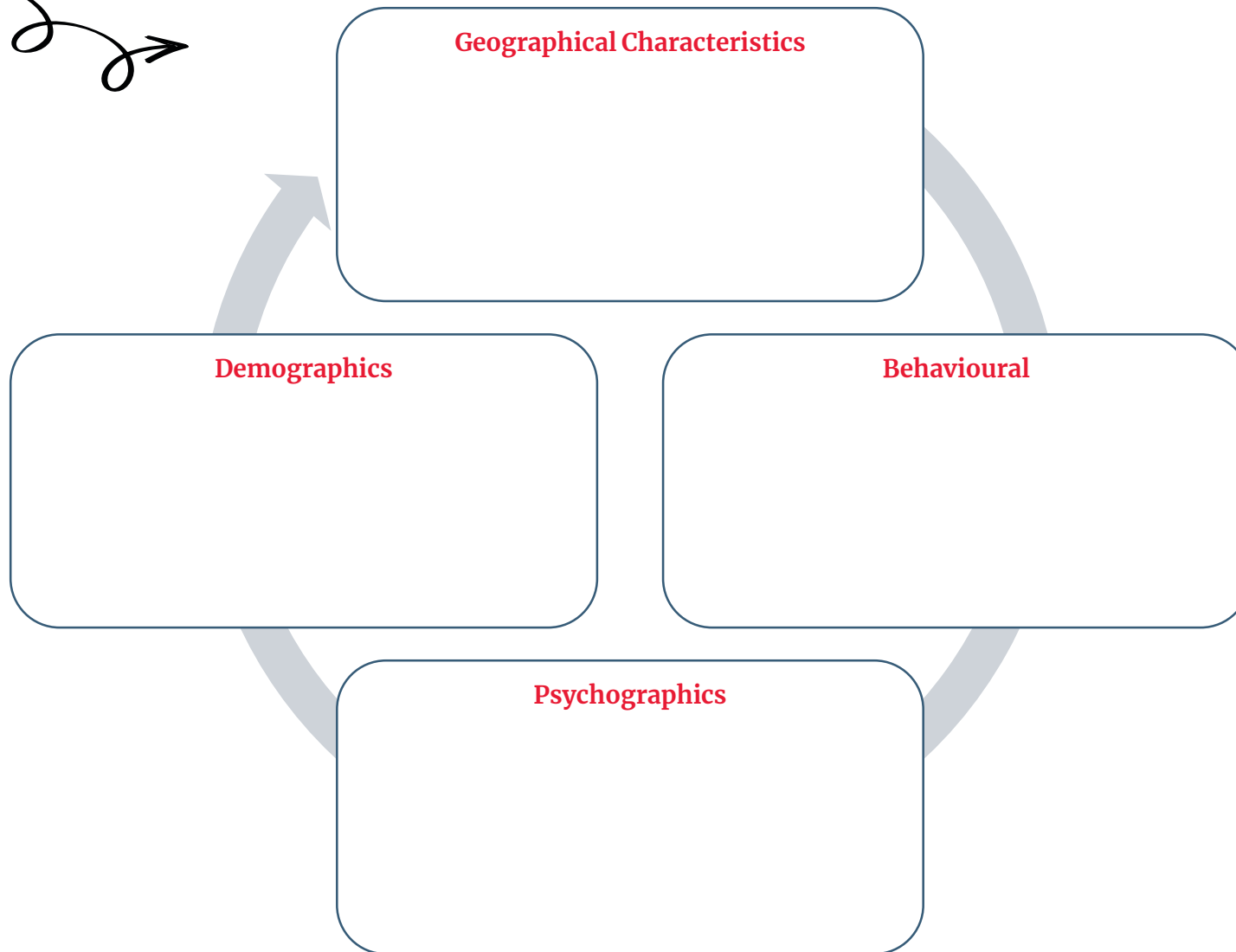
Market diversification strategy: \_\_\_\_\_

# Diversifying Markets



## Worksheet: Customer Analysis

Complete this Worksheet if you have selected a Market Development Strategy in the previous step.



**Geographical:** Location, climate, land use

**Demographics:** age, gender, ethnicity, religion, marital status, income, and education level, occupation, family size

**Behavioural:** buying frequency and volume, special buying occasions, loyalty, most valued product/service (price, quality, convenience), preferred distribution channel

**Psychographics:** values, motivations, attitudes, and conscious or subconscious beliefs.

# Diversifying Markets

## Step 05 Outline distribution strategy

Finally, you can outline a distribution strategy for your product in the new market and identify potential partners who need to or should be involved in the distribution network.

Your distribution strategy and network depends on the characteristics of the product, the characteristics of the customer segment, and, of course, the physical distance the product has to cover.

For this step, consider the characteristics of your product and the required conditions it should have (example: packaging for a fragile item, etc.) as it travels through the distribution network from your facility to the final customer.

Map your product's physical journey, where it starts, all the stops it makes, who handles it, and all the places it travels through until it reaches your customer. As you map the journey, consider the characteristics of the product (exemplified at the right hand side of the page). Furthermore, if you decided for a market development strategy on step 02, consider the characterisation of the new customer segment you made in step 03. These characteristics do not only inform you about where you need to place your product, but also who your customer is and the touchpoints and communication strategy you must have in place before the product even reaches them. For this purpose, also complete the touchpoints with the customers.

With this information in mind, complete the product journey in the *Worksheet: Outline Distribution Strategy* by thinking about all relevant steps you need to take; such as storage, transport, wholesaler, retailers etc; as well as the touchpoints with your customers. Then, think about all the potential partners that need to be involved in each step. Feel free to add further fields when you see fit.

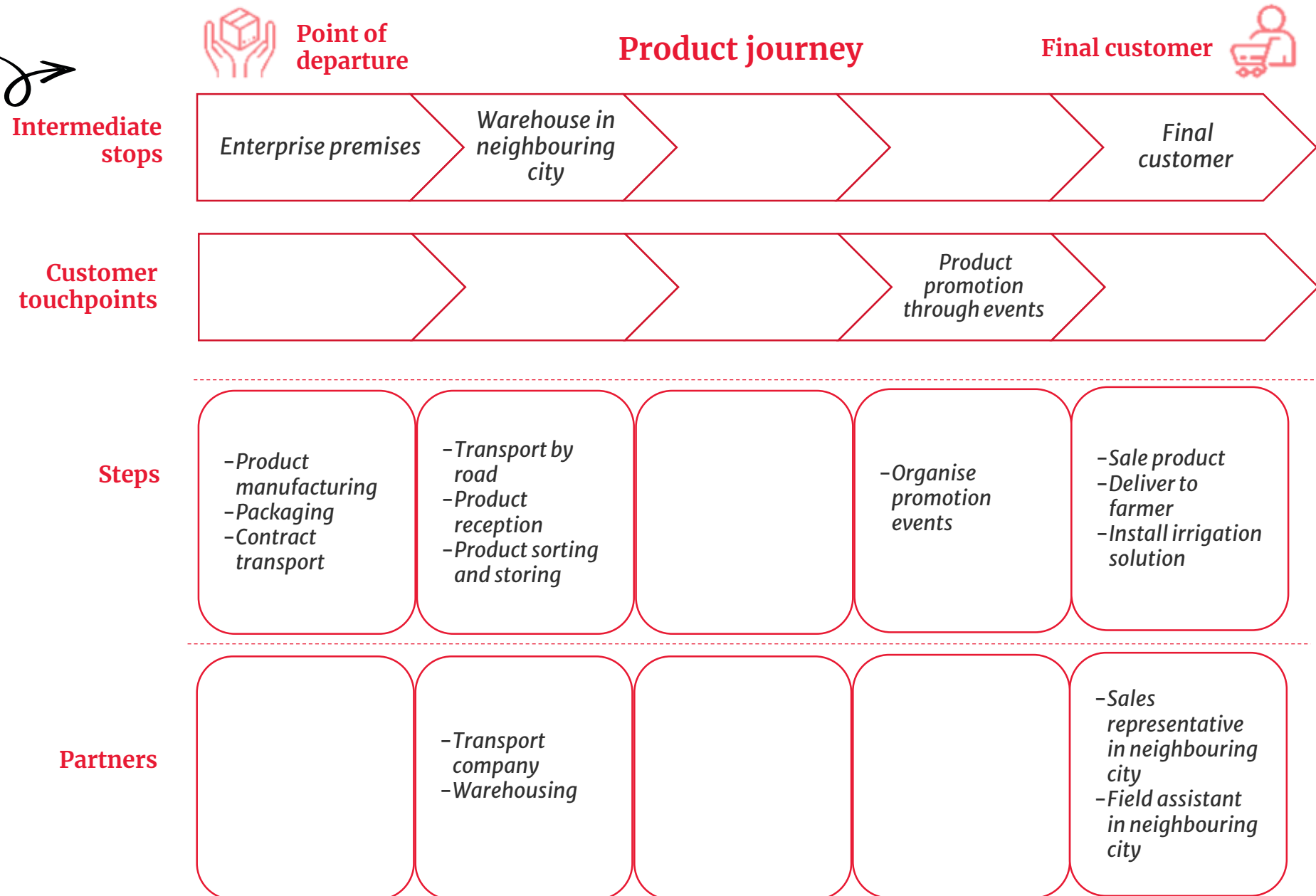
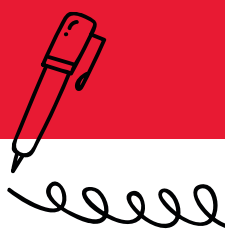
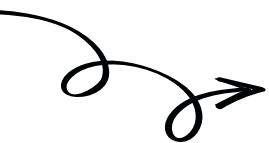
Understand the special requirements for your distribution network by knowing your product's characteristics related to transport:

- **Moving:** How slow or fast does your customer want to receive the product? How much time can pass between order and delivery?
- **Perishability:** Has your product a determined lifetime?
- **Fragility:** How likely is it for your product to break or lose the original format?
- **Quality degradation:** Focus on the essential qualities of your product. Is there a risk of degradation during distribution?
- **Handiness:** How easy is it to transport your product? This depends on size and texture, e.g. textiles or small items are very easy to transport compared to furniture.
- **Special requirements:** Does the product need to comply with a specific label, cautionary markings or language?
- **Other:** Are there other criteria that are important concerning your particular product? E.g. are your products delivered in a bulk or small entities?



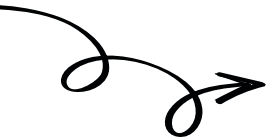
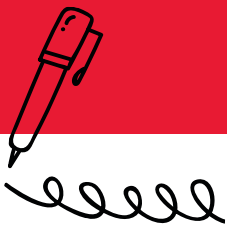
# Diversifying Markets

## Worksheet: Distribution Strategy - Example



# Diversifying Markets

## Worksheet: Distribution Strategy



Point of  
departure

Product journey

Final customer



Intermediate  
stops



Customer  
touchpoints



Steps

--	--	--	--	--

Partners

--	--	--	--	--

# Benefits Management

# Benefits Management

## When?

It is advisable to use this tool after having identified stakeholders, assessed the partnership and the main organisational issues and risks. Insights generated from this Benefits Management tool may reflect on the enterprise's business case and organisational structure.

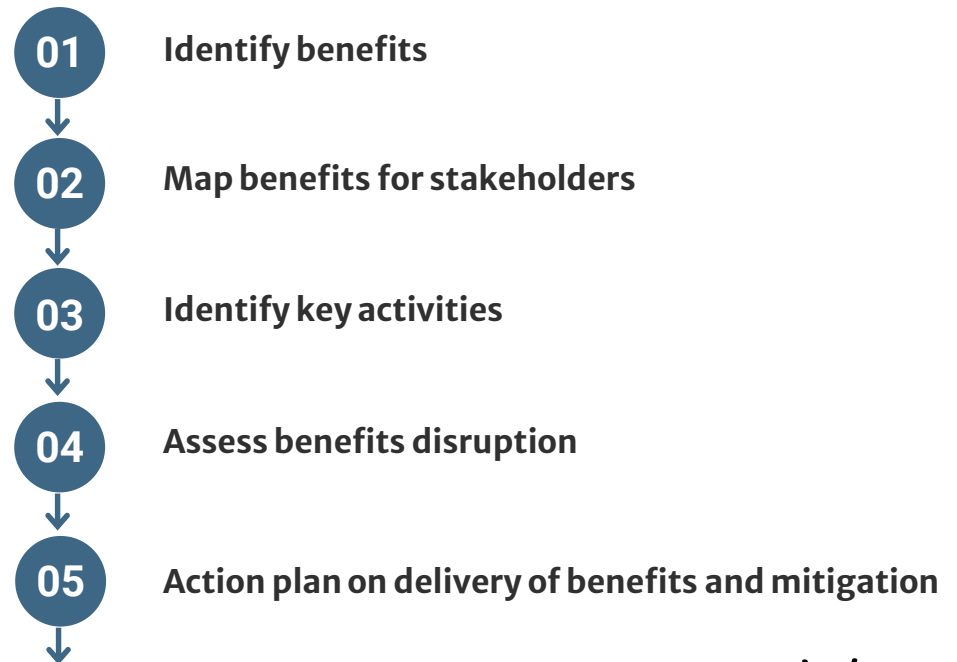
## What?

This tool aims at identifying the benefits or positive effects you create and deliver to your stakeholders beyond your desired impact. These are the positive effects/benefits that the activities aimed at one objective might have on other objectives in different fields. The tool will help you identify these broader benefits as well as the risks that may cause a disruption in the delivery of benefits.

## How?

Ideally, this analysis is done in a workshop-type setting, at best with all the relevant stakeholders being present in order to ensure that the perceptions of all interested parties are being considered. If this is not possible, the partnership structure should at least be well known to everyone present.

## Steps



## Key outcomes

- Creating an overview of the benefits produced for all your relevant stakeholders
- Understanding the importance of benefits from the stakeholders' perspective
- Understanding the risks in delivering the benefits and their mitigation strategies

# Benefits Management

## Step 01 Identify benefits

Beyond the intended impact or ultimate goal you pursue, there are unintended positive side effects or broader benefits. These benefits refer to the direct, indirect and induced effects the enterprise creates.

The benefits are indirectly derived from a decision on the completion of a project, or action, or service / product delivery. When thinking about the impact an enterprise brings, it is important to consider all the different types of benefits and not only the direct intended impacts you plan to achieve.

- To complete the *Worksheet: Benefits Management (step 01)*, revisit your value chain activities and map them in the worksheet, while also considering the desired impacts that your enterprise wants to achieve. For each of these value chain activities, think about each type of benefit that it creates and register it in the top of the *Worksheet*. We will return to the bottom half of the *Worksheet* in the following steps.
- Think about the status quo of the enterprise and the benefits and inputs that have been realised until now.

**Direct Benefits:** these are primary effects related to the activity, e.g. jobs created.

**Indirect Benefits:** these are inputs needed from other sectors of the economy, e.g. jobs that are supported in business to business transactions (from acquiring materials you need from a distributor, you are supporting his/her job).

Besides economic effects, indirect environmental effects (e.g. reduced emissions from using solar panels instead of fossil fuels) could be considered.

**Induced Benefits:** these are further secondary effects on a larger scale (e.g. community, region, nation, continent). By spending income from economic activities, demand for other goods and services is created which causes economic, social and environmental impact.

# Benefits Management

## Step 02 Map benefits for stakeholders

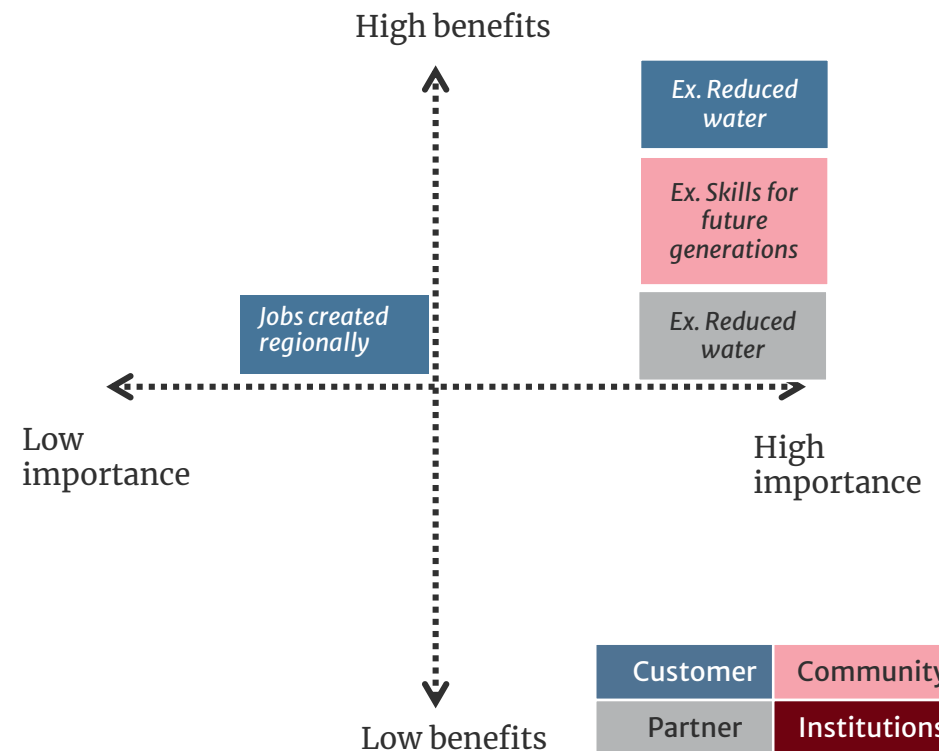
The benefits identified in the previous step are directed to different stakeholders. The different actor groups that you can impact through your activities are shown below.

Consider each stakeholder for each benefit and think about how, through your actions in achieving your KPIs, you can indirectly benefit other stakeholders.

In this step, you will map the benefits identified in the previous step from the stakeholders' perspective.

<b>Customer</b> 	Individuals and entities buying your product or services
<b>Partner</b> 	Suppliers, distributors, competitors...
<b>Community</b> 	Neighbours, employees, community leaders, CBOs...
<b>Institutions</b> 	Local, national government, government agencies...

- Take each of the actor groups and think if the identified indirect benefits are of high importance for them, and if the benefits they receive are high or low. Map each combination of benefit-stakeholder in the matrix on *Worksheet: Map benefits for stakeholders*.
- You may come across benefits that are high in value or very significant in quantity that are very important for some stakeholders but not so much for others, because the benefit does not represent any value for them.



# Benefits Management

## Step 03 Identify key activities

Now that you have mapped several benefits/stakeholders in the previous step, you should consider only the most important ones to focus on. Prioritise the benefits of high importance for your stakeholders, even if for now you are only delivering low benefits.

For the prioritised benefits you selected, you need to consider which are the key activities and resources that you need to ensure to be able to deliver these benefits.

For each benefit/stakeholder combination prioritised, think along your value chain:

- Which activities do you need to ensure?
  - Which resources do you need?
  - Which actors are crucial for the delivery of the benefit?
- Complete the value chain in the *Worksheet: Benefits Management (step 03)*. First highlight or mark those benefits you identified as a priority based on the mapping on the previous step with an exclamation mark. Then, include the identified activities, resources and actors along the chain required to deliver those prioritised benefits.
- From this step, you may identify that there are new stakeholders coming in as part of your benefits delivery, and that there may also be some stakeholders with enhanced responsibilities. Keep this in mind as they will be an essential part for developing the action plan to deliver the benefits in the final step.

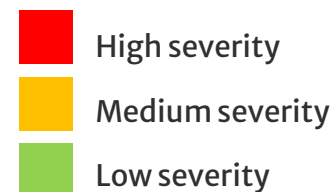
## Step 04 Assess benefits disruption

When carrying out the activities to deliver your benefits, there is always a risk that there may be disruptions along the processes and along the value chain, which will impede the delivery of those benefits.

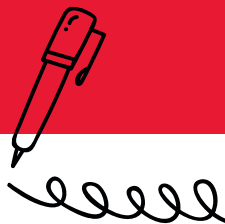
Even if these risks are normally there, the COVID-19 pandemic has increased the risk of disruption of delivery of benefits considering the disruptions it has created along value chains.

For the activities, resources and actors you have identified in the previous step, assess the risk of disruption for the delivery of the benefit in the event of a crisis such as the Coronavirus pandemic.

- In the *Worksheet: Benefits Management (step 04)* assess the severity of the possible disruptions that may occur along the value chain as high, medium or low, using the following colour scale. Include a post-it of the colour in the activity or resource you are assessing to identify it.



# Benefits Management



## Worksheet: Key activities and risks along the value chain - Example

### Value chain Processes



Step 01

Direct

Jobs created !

Indirect

Supported jobs of suppliers

Skills for future generations !

Less water used !

Induced

Jobs created regionally

Jobs created regionally

Step 03

Key activities for delivering benefits

Ensure sales

Ensure supply of materials

Delivery and installation of the product

Step 03

Resources and stakeholders needed to deliver benefits

Suppliers

Community field assistants

Step 04



High severity



Medium severity

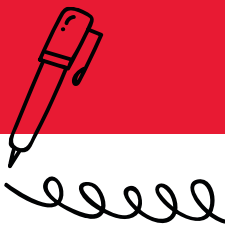


Low severity



# Benefits Management

## Worksheet: Key activities and risks along the value chain



### Value chain Processes



Step 01

Direct

Indirect

Induced

Step 03

Key activities for  
delivering benefits

Step 03

Resources and  
stakeholders needed  
to deliver benefits

Step 04



High severity



Medium severity



Low severity

## Step 05 Action plan on delivery of benefits and mitigation

After having identified and prioritised the benefits for the different stakeholders, as well as having identified the risks and severity of disruptions in the delivery of benefits, you are ready to set up an action plan to deliver the benefits which considers mitigation measures.

As you identified the key inputs and the risks in the benefits delivery, the benefit delivery value chain may reveal some kind of imbalances regarding some of the stakeholders and risks, where further action is required. That means that there may be stakeholders who regard a certain benefit as highly important, but are not receiving the benefit. Look again into them in a more detailed manner and make an action plan in order to deliver the benefit in a better way.

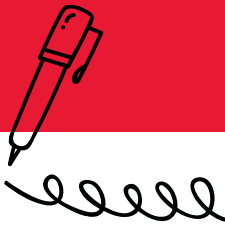
Furthermore, consider the possible disruptions and severity of this disruption identified in step 04 and include mitigation strategies for these in your action plan.

To develop the action plan, think about the following:

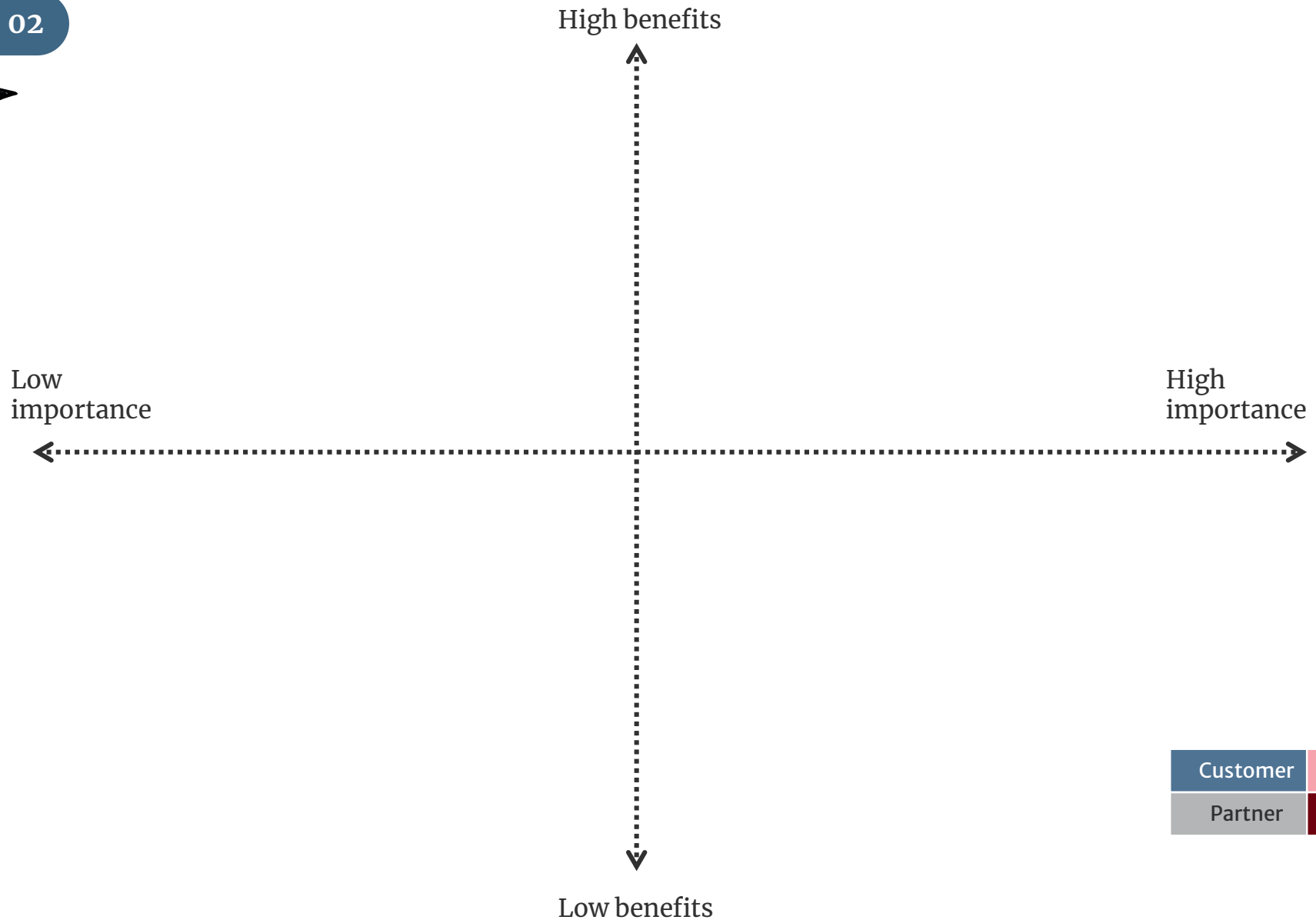
- What can be done to change something in the current state of being?
  - Is there a possibility to bring additional benefits to a stakeholder who receives relatively low benefits?
  - And if yes, how can it be done and what are the additional resources needed to do so, new potential partnerships with stakeholders, etc.?
  - What can be done to mitigate the disruption of delivery of benefits in the face of unforeseen events?
- Complete the action plan on *Worksheet: Action plan and mitigation measures* by identifying the stakeholders and their benefits, and defining the activities to deliver the benefit, the mitigation measures for the disruption risks, the responsible person, resources needed and timeframe.

# Benefits Management

## Worksheet: Map benefits for stakeholders

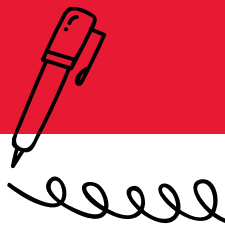


Step 02



Customer	Community
Partner	Institutions

# Benefits Management



## Worksheet: Action plan and mitigation measures

Step 05

Stakeholder	Additional Benefit (long – short term)	Disruption risk	Activities list (including mitigation for disruption)	Responsible	Resources needed	Timeframe
Ex. Community	Skills for future generations	High – due to reduced jobs from unavailability in supply	<ul style="list-style-type: none"><li>- Agreements with suppliers</li><li>- Training programme for ex-employees</li></ul>	Head of commercial department		

# ROPE Analysis

# ROPE Analysis

## When?

Whenever your organisation is about to culminate any kind of project, whether investment project, scaling, product prototyping, etc.; you can always use this tool to avoid a premature closure of the project, as well as gain insights and share the learnings from its development with the aim at identifying opportunities for the future.

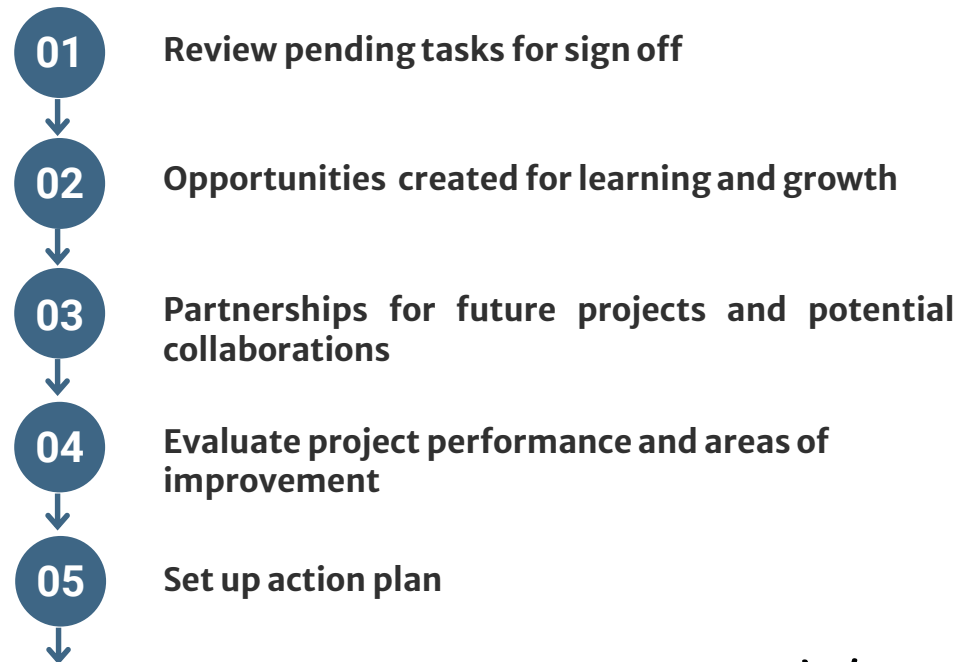
## What?

A ROPE Analysis guides your organisation into closing and evaluating a project, gaining valuable lessons from its external and internal factors. Furthermore, whether it is an investment project, developing a product prototype, or any other project, the ROPE analysis guides you into identifying future external and internal opportunities from your previous experience.

## How?

When you are about to complete a project, gather with all the people who were involved in its development to assure complete closure and gain insights about the process and performance and the pending tasks. Evaluate the project together to identify future opportunities and share the learnings across your entire enterprise.

## Steps



## Key outcomes

- Identifying next steps to wrap up the project, while recognising learnings to create future opportunities
- Identifying external partnerships and concrete actions for future projects
- Evaluating the performance of the project for continuous improvement

# ROPE Analysis

## Step 01 Review pending tasks for sign off

Throughout the ROPE analysis you will be guided through 4 steps to determine important tasks to avoid a premature closure of the project and gain productive learnings that will inform your future projects and improve their performance as well as partnerships. Throughout the analysis you move as shown in the diagram between the future and past and internal and external factors to identify next steps, opportunities, partnerships, and learnings from past performance.

In this step you will look into the future to identify the pending tasks for the project to wrap-up (highlighted in yellow in the diagram). Brainstorm with the team involved in the project and go through the activities originally planned and assess the completion status.

Think about what documentation you need to complete, reports you need to finalise and make available, the showcasing you should carry out, etc.

- In the *Worksheet* note down the pending tasks to completely close the project and assign the responsible person.

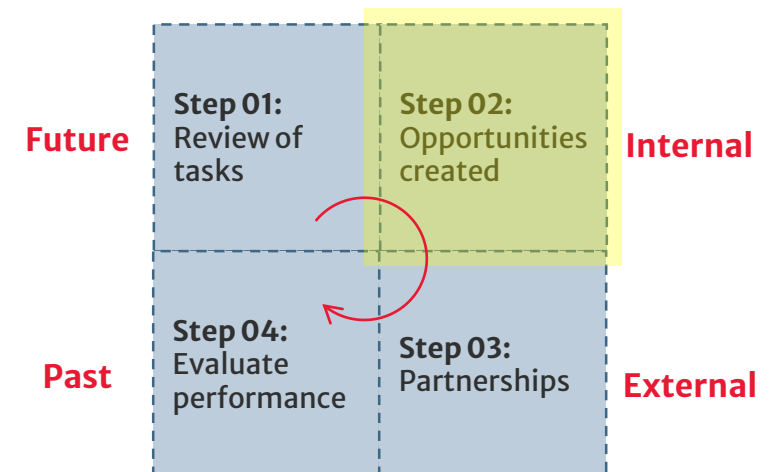


## Step 02 Opportunities created for learning and growth

By looking back on the development of your project (moving towards the internal perspective as highlighted in the diagram), in this step you will identify the value and opportunities created.

Think about what where the challenges that you faced during the development of the project and the learning you gained from each.

- In the *Worksheet* note down in the top-right quadrant (highlighted quadrant below) the value created from the project as well as the top key opportunities you identified, derived from the challenges you faced.



# ROPE Analysis

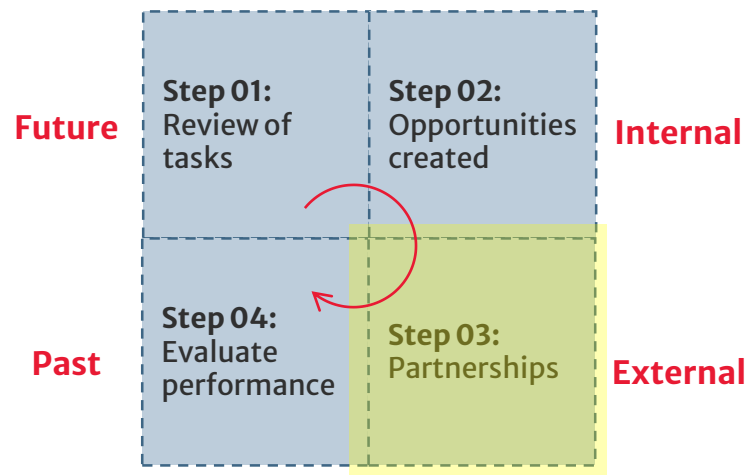
## Step 03

### Partnerships for future projects and potential collaborations

No we will move into the external perspective to analyse the partnership opportunities that stem from the development of the project.

In this step, analyse with your team how the work with your current partners was: were they easy to work with? What would you improve? Think about other actors that were not involved or not involved as much in the project but that you consider important and think where you may find future opportunities to engage with them.

- In the *Worksheet*, in the bottom-right quadrant (highlighted in the figure below), note down the top three potential partnerships identified, as well as future actions to engage with them or to improve current partnerships.

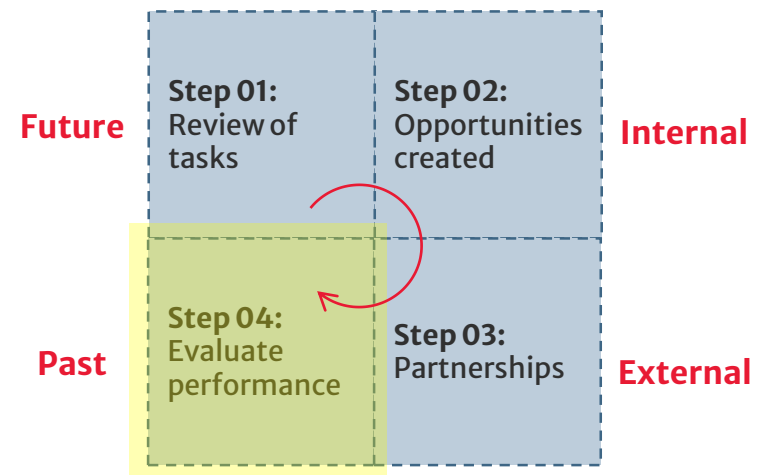


## Step 04

### Evaluate project performance and areas of improvement

Finally we wrap-up the ROPE analysis looking at the past. In this step, you will evaluate the overall performance of the project, aiming at identifying areas of improvement. By having conducted the previous steps, you will be more prepared to wrap-up a more objective evaluation. In this step you will focus on corrective action to take on. For this, think about:

- How was the performance of the project against the goals set initially? Excellent, good, insufficient?
- Considering the performance and the factors that influence it, what activities should be continued? Which ones should be stopped? And what about activities that you had not done so far?
- What improvement action could you take immediately with the resources available? And what other can you develop later?
- In the *Worksheet* note down your reflection in the bottom-left quadrant (highlighted quadrant in the figure below)





# ROPE Analysis

## Step 05 Set up action plan

Now that you have completed the **ROPE** Analysis and come up with some action points for each of the elements, it is time to develop a thorough action plan that allows to set the action point into motion.

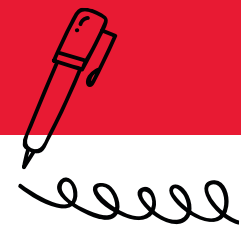
Look back into the analysis and set the activities to be carried out for each of the action points. Continue listing the resources needed, the responsible person(s) and the time by when you wish to achieve each activity.

- Complete the required action plan in the *Worksheet: ROPE Action Plan* in the following page. List the activities in each corresponding element and fill in all the information required.

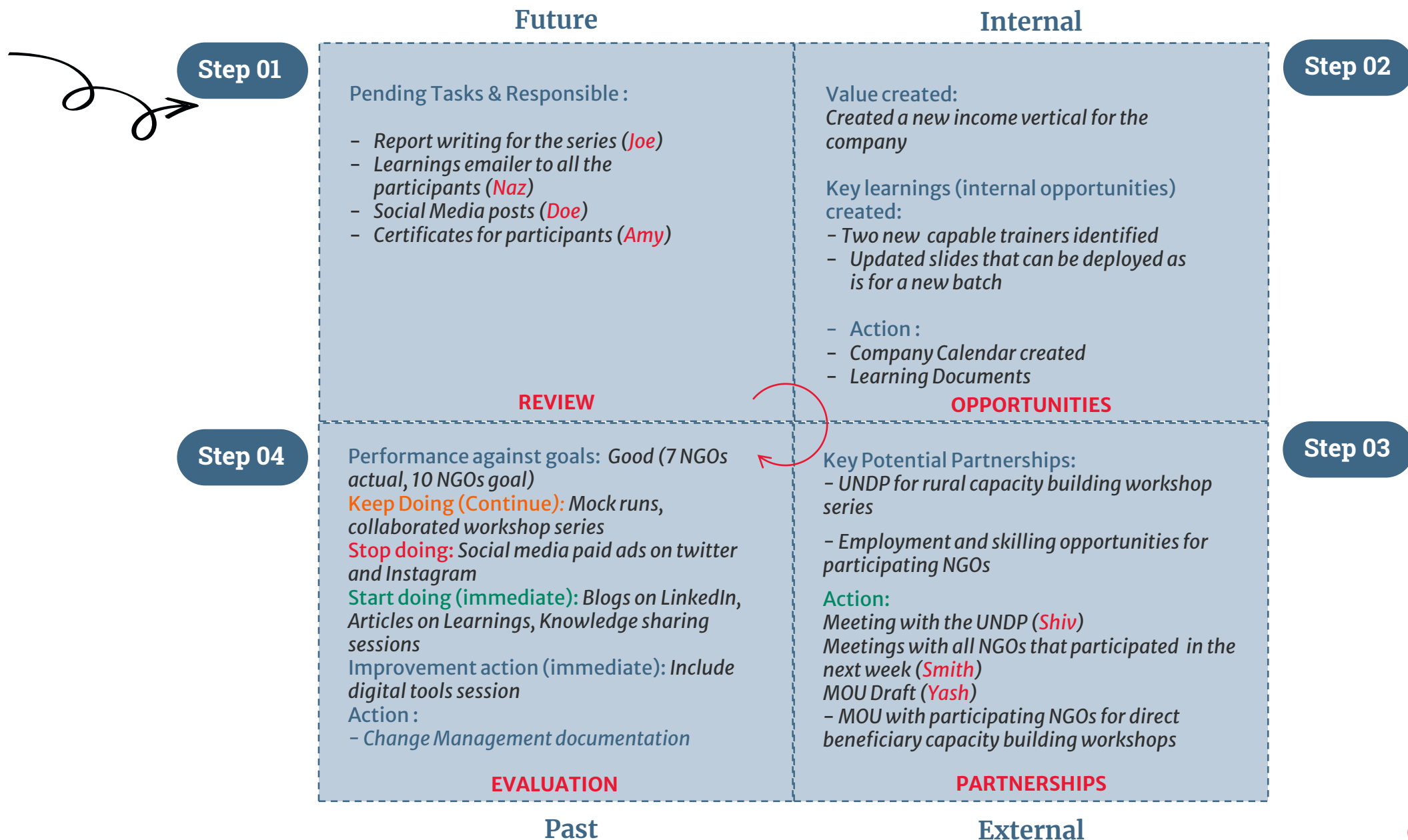
Example:

Dimension	Activity	Resources	Responsible(s)	Timeframe
<b>R</b> Review	Write report		Joe	3 weeks
<b>O</b> Opportunities	Create company calendar		Doe	2 weeks
<b>P</b> Partnerships	Schedule meeting with UNDP		Naz	1 week
<b>E</b> Evaluation	Write blog in LinkedIn		Doe	4 weeks

# ROPE Analysis

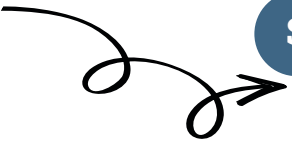
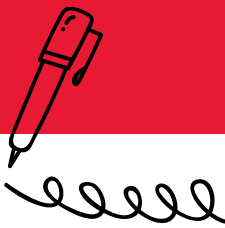


## Worksheet: ROPE Analysis – Capacity Building workshop series for NGOs

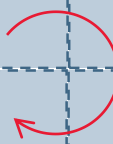


# ROPE Analysis

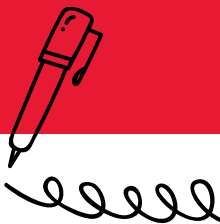
## Worksheet: ROPE Analysis



	Future	Internal	
<b>Step 01</b>	<p>Pending Tasks &amp; Responsible :</p> <ul style="list-style-type: none"><li>-</li><li>-</li><li>-</li><li>-</li><li>-</li></ul>	<p>Value created:</p> <p>Key learnings (internal opportunities) created:</p> <ul style="list-style-type: none"><li>-</li><li>-</li></ul> <p>-Action:</p>	<b>Step 02</b>
	<b>REVIEW</b>	<b>OPPORTUNITIES</b>	
<b>Step 04</b>	<p>Performance against goals:</p> <p>Keep Doing (Continue):</p> <p>Stop doing:</p> <p>Start doing (immediate):</p> <p>Improvement action (immediate):</p> <p>Action :</p>	<p>Key Potential Partnerships:</p> <ul style="list-style-type: none"><li>-</li><li>-</li><li>-</li></ul> <p>Action:</p> <ul style="list-style-type: none"><li>-</li><li>-</li><li>-</li></ul>	<b>Step 03</b>
	<b>EVALUATION</b>	<b>PARTNERSHIPS</b>	
	Past	External	



# ROPE Analysis



## Worksheet: ROPE Action Plan

Step 05

Dimension	Activity	Resources	Responsible(s)	Timeframe
R Review				
O Opportunities				
P Partnerships				
E Evaluation				



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