

A photograph of a man and a woman in a market stall. The man, on the left, is wearing a blue t-shirt and has a beard. The woman, on the right, is wearing a black headscarf with white embroidery and a pink patterned top. They are both looking at a bowl of red tomatoes. In the background, there are other market stalls with various goods.

Apr 2022

Conducting a Gender Analysis

How it can help your business and how to do it



Foreword

This guide is one of a three-part series of tools designed to help companies be more gender inclusive. The series includes practical guides for how to lead:

- A Gender Equality Policy (published in August 2021)
- A Gender Training (published in December 2021)
- A Gender Analysis (this guide)

Each guide explains **why** a company may be interested in becoming gender inclusive, **how** to go about changing, and handy **templates** to put into practice.

The **WIN Program** is a five-year initiative implemented by **TechnoServe** and financed by the **Embassy of Sweden in Mozambique**. Our objective is to economically empower women in Mozambique by enabling their participation in the economy. To do this, we support the private and public sector to trial and implement sustainable changes in the way that they approach women as potential customers, suppliers and business partners.

Our tools and guides are applicable beyond Mozambique and we are happy to discuss their implementation in other contexts.

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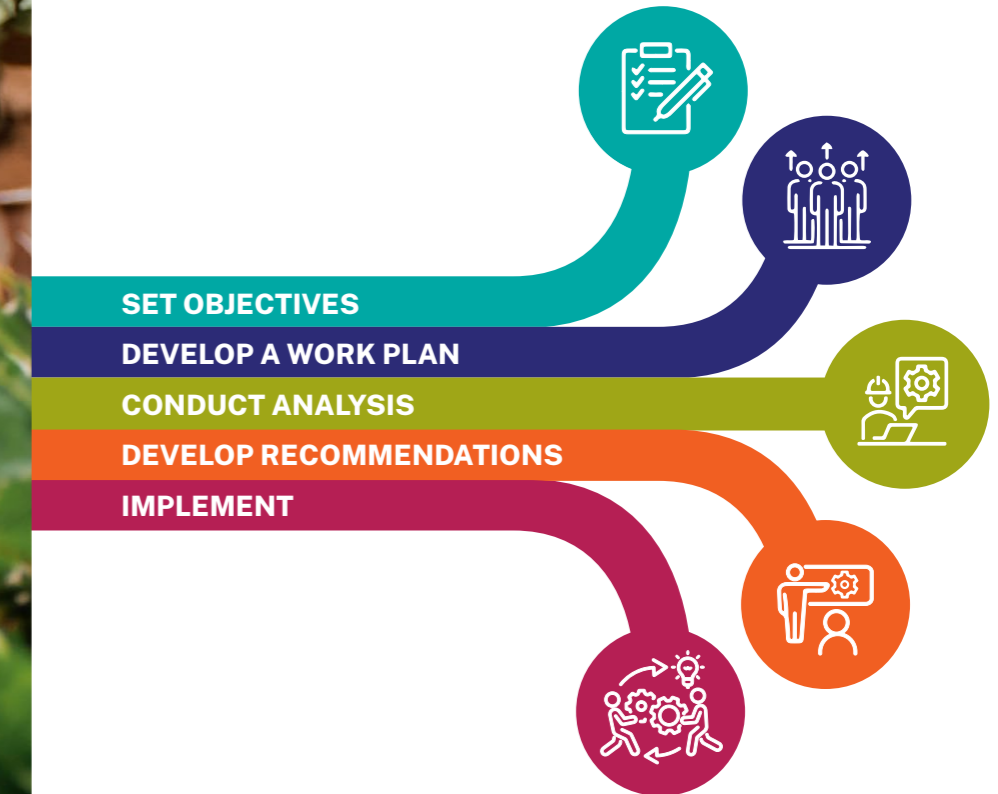
win-moz.org



Summary

Gender analysis is a process to understand the relationships between women and men, their access to resources, their activities, and the constraints they face relative to each other. Companies can use this process to identify opportunities with women and men through their business operations.

The key steps of a gender analysis are:



This guide is directed to businesses that are looking to promote gender equality, and is based on TechnoServe and WIN experience with its partners.

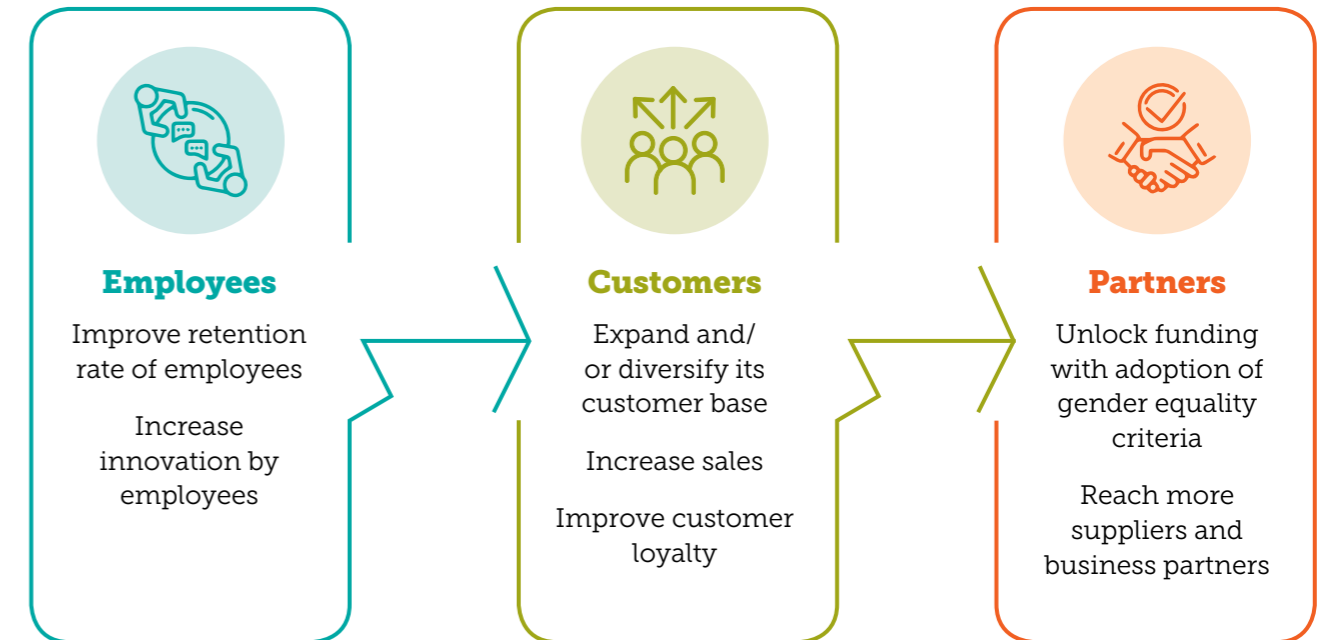
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Why should your business conduct a gender analysis?

Gender analysis can help identify ways to improve business in the following areas:



Examples of gender analysis benefits



Gender lens

For ENGIE Energy Access, the WIN Gender Analysis has been an invaluable process in better understanding the Mozambican market, both in terms of employees and customers.

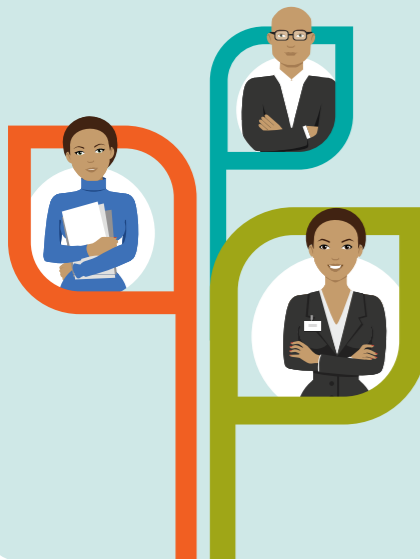
Understand challenges faced by women

With regards to employees and contractors, the Analysis has helped us to quantify and counteract the impact of unconscious and conscious biases in our hiring strategy and implementation, and to better understand the challenges faced by female sales agents and their main reasons for attrition.

Expand loyal customer base

Commercially, the gender analysis has afforded us a deeper understanding of our female customer, specifically aiding us in better targeting and supporting them in acquiring and paying for energy products.

- Luke Hodgkinson, Managing Director of ENGIE Energy Access Mozambique



What can businesses learn through gender analysis?

Women and men have different

Roles at home and work, shaped by society

Information channels

Education levels, skills & confidence

Control over income and other benefits

As a result of these gender differences, women and men have different needs, challenges, and opportunities in the workforce and as customers:



In the workforce, women and men have different

Opportunities to apply for and be hired for certain jobs

Ways of hearing about employment or promotion opportunities

Ability or willingness to compete for higher paying jobs or promotions

Incentives that would encourage them to continue to work with the company



As customers, women and men have different

Needs and preferences for products and services to help them do their work

Ways of hearing about products and services

Preferences for which products and services they consider more user-friendly

Ability to afford products / services or make purchasing decisions

Case study

How a business used gender analysis to find ways to hire more women sales agents and reach more customers



Case Study: ENGIE Energy Access Gender Analysis

ENGIE Energy Access conducted a gender analysis to identify strategies to reach more women as clients

ENGIE Energy Access is a leading solar home system provider in sub-Saharan Africa. In rural areas not connected to the power grid, solar energy can enable families to run lights, phones, radios, and more.

The company landed in Mozambique in 2019 with the goal of bringing affordable solar panels to **200,000** rural households by 2022. These panels are distributed by local sales agents.

There is a strong business case for reaching more women as sales team members and customers. Women are involved in purchase decisions and are key users of solar products, also women sell more effectively to other women. So, ENGIE wanted to learn:



How gender influences the recruitment process and day-to-day sales team experience



Challenges women and men sales team members may face because of their gender, and opportunities to address them



How gender affects the customer experience and their interactions with sales team member

Using a five-step gender analysis, WIN helped ENGIE identify where employee and customer-focused initiatives are most useful, define specific initiatives and advise their implementation. This tool reviews this gender analysis process, giving examples of what ENGIE did at each of the five steps.

5 Steps to conduct a gender analysis and the case study with ENGIE Energy Access

Apply a gender framework



Step 1 Set Objectives

Define the objectives of the gender analysis

The first step for conducting a gender analysis is to define the key objectives.

The objectives should be defined based on what the business wants to learn from the gender analysis to strengthen its business.

Common objectives could include:

1. Promote growth and innovation through gender-balanced teams
2. Improve retention rate of employees
3. Expand loyal customer base

Top Tips!

Consider how women participate in different roles in the business (staff, customers, promoters, agents, etc.):

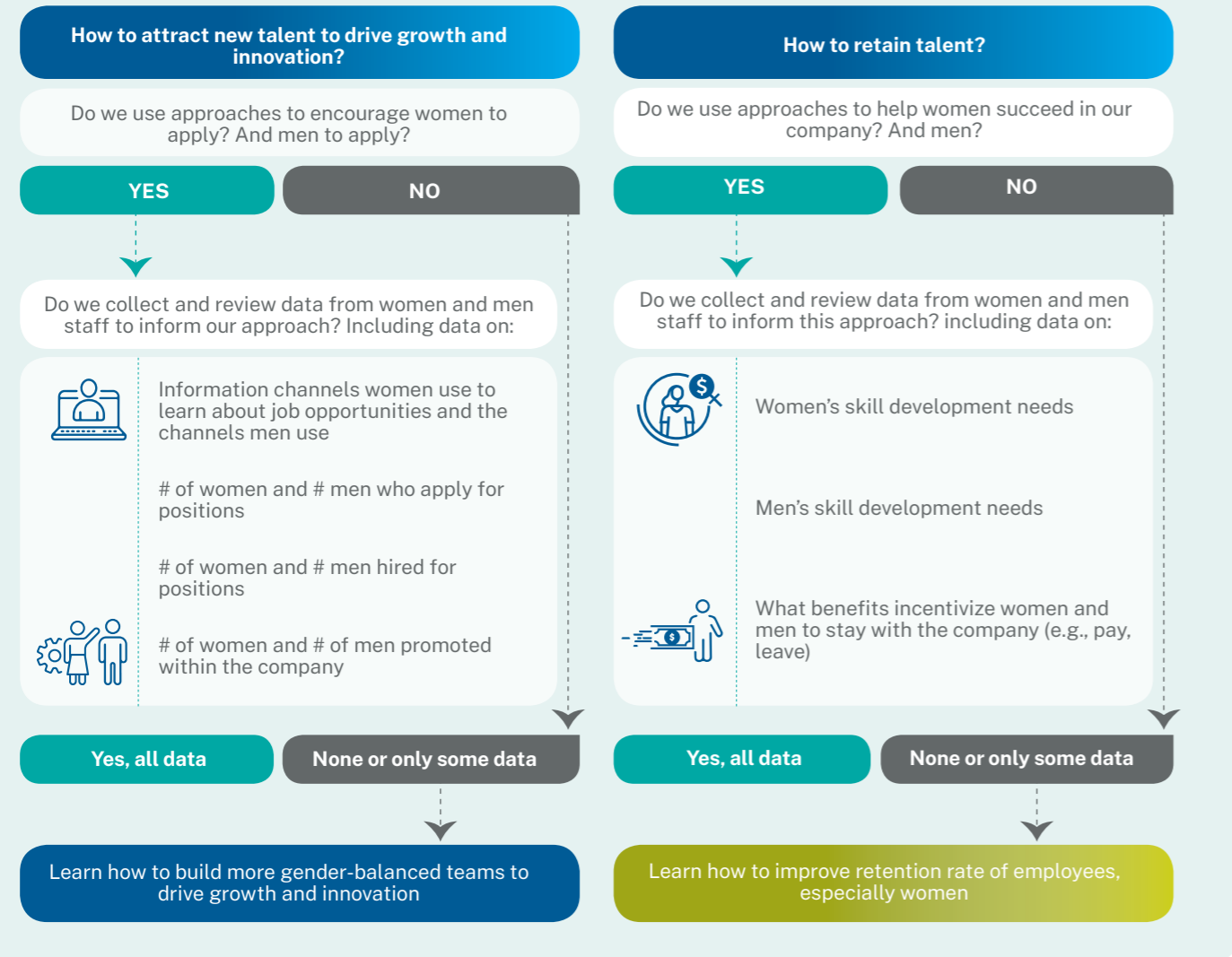
- Which are the most important categories?
- Where are women concentrated? Where are there few women?
- What does your business want to learn about them?

Keep it focused - define 1-3 key research objectives.

Outline questions that you want to answer in the research.

Set objectives using a decision tree

- What do we need to learn more about to improve our business?



Case Study: ENGIE Energy Access Gender Analysis

ENGIE consulted with WIN and determined that they wanted to learn:

- How gender influences the recruitment process and day-to-day sales team experience
- Challenges women and men sales team members may face because of their gender, and opportunities to address them
- How gender affects the customer experience and their interactions with sales team members

WIN helped ENGIE to identify challenges women may face as ENGIE's sales agents and customers





Step 2

Develop a Work Plan

Key components of a work plan - checklist

- **Kick-off** with the gender analysis taskforce to understand and align on priorities (see next page)
- **Check-ins** with the taskforce to update on progress
- **Team responsibilities** – define a clear owner for each activity or task
- **Research and analysis plan**
 - ▷ Desk research (existing sex-disaggregated data)
 - ▷ Primary research
 - ▷ Synthesis and analysis
 - ▷ Reviewers for feedback
- Format of **output** (written report or powerpoint or both)

Dissemination of the work plan

Assess internal capacity to conduct a gender analysis

Put together a **Gender Analysis Task Force**, comprised of a diverse group, including key management team representatives as well as the **Gender Leads**, for example:

Executive Management team (CEO or COO)	Decision-makers
Director of Human resources	Knowledgeable about staff and/or customer base
Operations and/or Commercial team leads (customer facing teams in general)	Transferable skills to help do a gender analysis

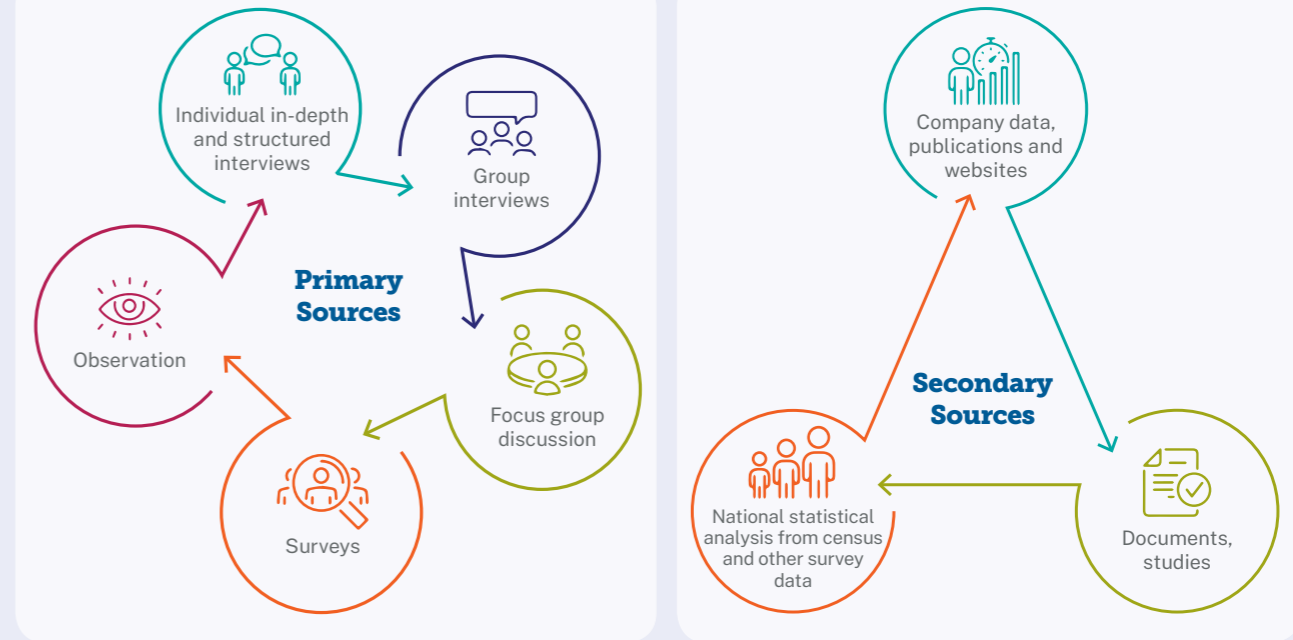
- Assign a Project Manager for the gender analysis, reporting to top management, who will be responsible for overseeing the implementation of the work plan.

Top Tips!

If your business has already selected Gender Lead(s), make sure that they are part of the Gender Analysis Task Force

A Gender Lead(s) is an individual or a group of people that have been identified and selected to represent the needs of both genders, for example as an outcome of **Gender Awareness Training**.

Identify sources of information/ availability



For example, mapping key sources of information for the key gender analysis question

Approach	Key Questions (examples)	Sources of information
Staff Needs	What are the resources/support that women and men need to become and thrive as sales agents?	Primary Sources: surveys, interviews, focus group discussions
Recruitment Methods	What are the most effective ways to identify, attract and recruit women and men agents?	Primary sources: surveys, interviews, focus group discussion
Incentive systems	Do existing incentive mechanisms for field team promote greater recruitment and retention of women and men?	Primary Sources: surveys, interviews Secondary Sources: company data



Case Study: ENGIE Energy Access Gender Analysis

Example of a work plan used by ENGIE:

Activity	Responsible	Apr		May	
		12.	19.	03.	10.
Kick-off and define team responsibilities	Management Teams	█			
Define gender analysis frameworks	Management Teams	█			
Conduct primary research	Operations		████████████████████		
Analyse data/ information	Operations		████████████████████		
Develop 2-3 interventions for recruitment/ training / marketing	Operations and Commercial			████████████████████	
Final report in PPT	Operations				█

The Gender Analysis Task Force at ENGIE was led by the Operations Director, Project Managed by one of its team members. It was also comprised of Commercial Director, Sales Training Team members and had the support of the TechnoServe WIN team.

Also the data collection of the primary research counted on the support of the call center, part of Customer Service team.



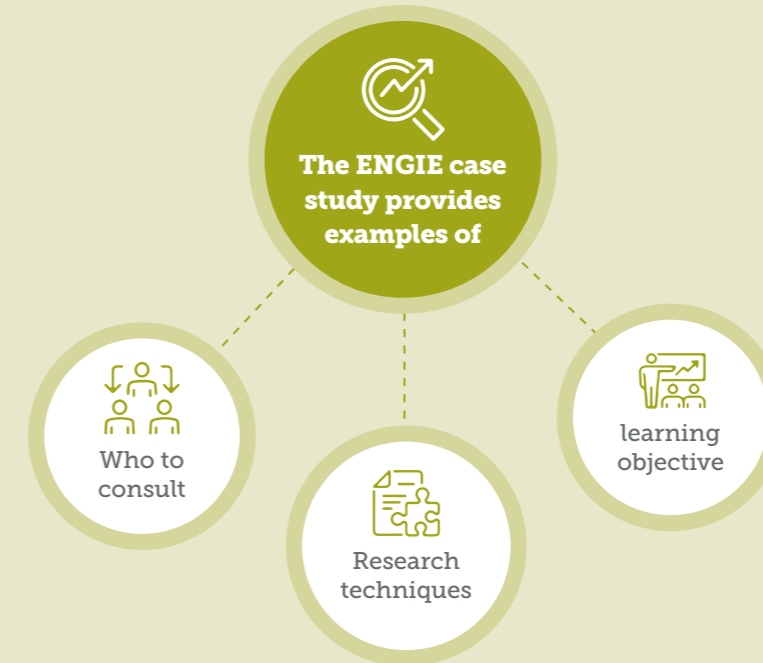
Step 3

Conduct Analysis

Design data collection activities

Based on your learning objectives, you will need to determine:

1. Which stakeholders to consult (e.g., staff, customers)
2. The best way to get information from each stakeholder (e.g., interview, survey)



Top Tips!





Things to consider when developing your interview questionnaire/ guides:

- Review the key objectives of the gender analysis and the approach defined on previous step;
- How much time will you plan to spend with the respondent?;
- Start with “warm-up” questions- something respondent can answer easily;
- A survey with closed-ended questions is best to get quantitative data, whereas interviews with open-ended questions are best for learning in depth;
- For questions about sensitive topics, do not ask the respondent directly, ask what he/she thinks about this or what people in the community think about this;
- Practice using the questionnaire with a couple of stakeholders and adjust if necessary.



Case Study: ENGIE Energy Access Gender Analysis

Research included feedback from 85+ stakeholders, focusing on current employees and customers

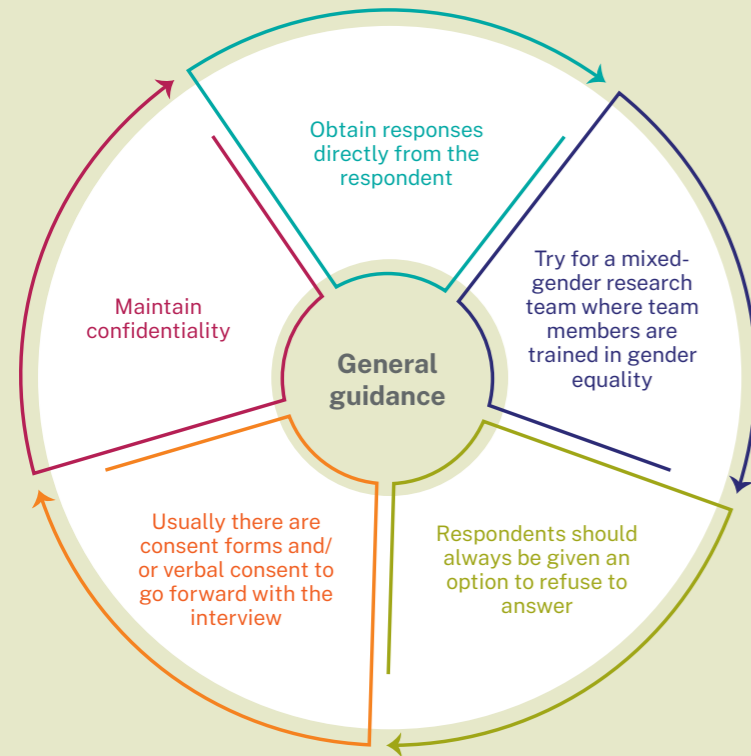
Stakeholders	Research activities	Research focus
 Sales team	<ul style="list-style-type: none"> 9 interviews with sales team managers and agents Survey of 30 GES 	<ul style="list-style-type: none"> Understand how a team member's gender may affect his/her experience Identify opportunities to improve recruitment
 Customer experience team	<ul style="list-style-type: none"> 10 interviews with service and call center staff 	<ul style="list-style-type: none"> Gather additional perspective about sales team and customers Explore perceptions of gender differences in sales team and customers
 Customers	<ul style="list-style-type: none"> Survey of 33 customers 	<ul style="list-style-type: none"> Gather information on customer experiences and challenges, disaggregated by gender
 Potential customers & employees	<ul style="list-style-type: none"> 5 interviews with female micro-retailers 4 interviews with cassava farmers 	<ul style="list-style-type: none"> Understand how household decision-making dynamics may affect a woman's decision to buy a product or work as a GES

Examples of questions about the effectiveness of women and men in a sales team (agents, sales managers, etc.)

This can be adjusted - for instance, to be about retention of male and female employees

Topics	Questions
 Roles at home and work, shaped by society	<ul style="list-style-type: none"> How does the organization recruit women staff? What beliefs and norms of women and men agents affect their ability to succeed? How can the commercial team reach more women customers? Where can they find women customers? What methods will be most effective to identify these? Do women and men in the sales team face any time and mobility constraints? (e.g. cultural norms requiring them to be at home for certain periods of time, or safety concerns)
 Information channels	<ul style="list-style-type: none"> Do women or men in the sales teams have different information on product/services characteristics? In what ways? What additional information would increase their effectiveness?
 Education levels, skills & confidence	<ul style="list-style-type: none"> What is the current level of satisfaction and confidence of women and men in the sales teams (both managers and agents)?
 Control over income and other benefits	<ul style="list-style-type: none"> How do sales managers make decisions about recruitment? What are the challenges? Do women or men sales managers make decisions about recruitment differently? How do men and women customers make decisions to purchase? Do they consult anyone else in the process?

Roll out survey/ interviews

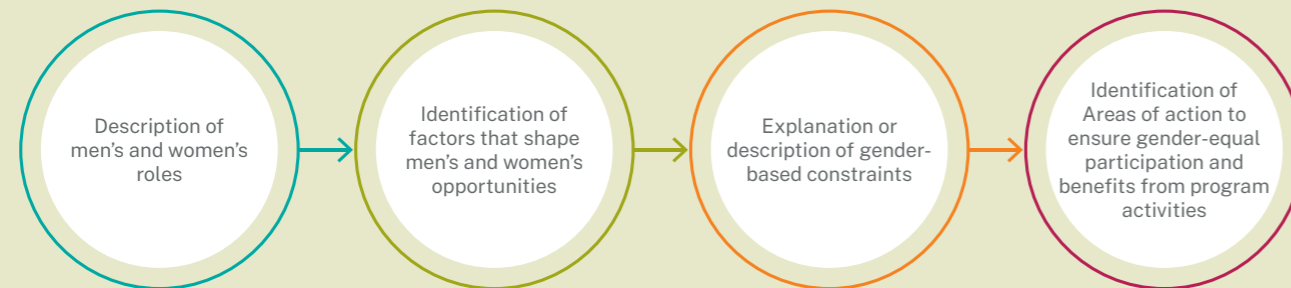


Top Tip!

Be aware of bias. There are different type of bias that can be avoided when rolling out survey/ interviews, so be mindful. Here are some examples:

- Be clear about the process of the interview/survey and its objectives.
- Know your audience. Avoid using terms that can trigger people to be unresponsive or untruthful. For example: development jargon that can influence the answers (e.g. women's empowerment).

Analyse data/ information



Step 4

Develop Recommendations

Synthesize findings and prioritize issues

Summarize key issues and evidence from the analysis related to each one of the objectives.

Evidence could comprise both primary (surveys, interviews) and secondary (reports, literature) data on the issue.

Challenge	Key Issues	Evidence
Recruitment		
Retention		
Sales		
Overall		

Identifying challenges and opportunities:

- What are the most important hypotheses that emerge from your analysis?

Root causes:

- Why are we seeing these results?
- How does the data support it?



Key Challenges/ Opportunities

Root causes

There are twice as many men as women working as sales agents.

- Recruitment and outreach process favors men
- Managers use inconsistent selection criteria and shows bias towards men
- Women may be hesitant to apply due to social norms

Top Tip!

Communicate qualitative information using direct quotes and stories from the interviews.

Top Tip!

Root cause can combine evidence from different aspects of your data collection. It is possible to find a root cause driving more than one challenge.

Define initiatives

- Define possible initiatives based on their impact and ease to implement.
- Find criteria most relevant to the business. It could be a criterion: 'relevance to a key product' or 'cost'.



Challenge	Initiatives	Description	Potential Outcomes	
			Impact	Ease to implement
Recruitment	Selection Process	<ul style="list-style-type: none"> • Provide enhanced guidance to managers to conduct interviews and make selection decisions in a fair and objective manner 		



Case Study: ENGIE Energy Access Gender Analysis

Key findings

Areas of opportunity



Sales agents

Recruitment practices were likely overlooking high-quality female sales agents

Standardize recruitment to include female-friendly outreach and fair selection criteria

Some staff believed female sales agents are less capable, which is not grounded in evidence and may contribute to higher attrition

Support sales managers with:

- Gender-sensitivity training to identify and address bias
- Guidance on effective support of female sales agents



Customers

Sales agents perceive men as "easier" customers because they have more financial power and straightforward decision-making dynamics

Train sales agents to think critically about customer needs and decision-making dynamics

Both men and women use products in the majority of customer households, though women report more technical challenges

Support further data collection on women users to drive customer impact



Case Study: ENGIE Energy Access Gender Analysis

ENGIE Energy Access Mozambique

As a result of the Gender Analysis with WIN, ENGIE's management learned about different constraints women and men faced; their unconscious biases in recruitment processes and the importance of sex disaggregated data to better understand their customers.

The team then worked with different staff members to address these issues. With Human Resources, they analyzed the career progression track, realized it was biased towards women and adjusted it. They also changed their agent recruitment processes to increase the chances of women agents to be recruited. Understanding that women sales agents have unique strengths and may better reach women clients, but face distinctive challenges, they designed strategies with their field team to address this.

These strategies resulted in increased customer satisfaction and sales.



Resources for conducting a gender analysis

Workplan Template

Accessible via [this link](#)

Questionnaire Guide

Accessible via [this link](#)

Terms of Reference for hiring a Gender Expert

Accessible via [this link](#)

How to Create a Gender Action Plan

Accessible via [this link](#)

Creating a Gender Equality Policy

Accessible via [this link](#)

Delivering a Gender Awareness Training

Accessible via [this link](#)

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“We urgently need to tell women in Mozambique to open their minds. They need to know that it is possible to have a job. Today, there should no longer be certain jobs considered specifically for men or women.”

Elsa Comé, ENGIE Energy Access customer experience team



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