# WASH TOOLKIT FOR SOCIAL ENTERPRISES

**Creating business synergies between customers and organisations to increase use of WASH services and behaviours**

TRANSFORM

# CONTENTS

# EXECUTIVE SUMMARY

Safe drinking water, sanitation and hygiene (WASH) are crucial to human health and well-being. Safe WASH is not only necessary for improved health and quality of life, but contributes to livelihoods, dignity and other related issues like workforce participation, school attendance, social engagement, and helping create resilient communities.

Small-scale social enterprises around the world are emerging as important contributors to sustainable WASH practices and service delivery for low-income communities and households.

Like with all businesses, ensuring programmes and services successfully scale-up is crucial. For WASH-focused enterprises, this means creating a sustained need for WASH products and supporting increased demand with supply.

Ultimately, a key part of business growth comes down to building relationships. By engaging deeper with the communities they serve, enterprises can better understand their needs, develop trust, increase access and encourage the use of WASH products and services as well as consistent WASH behaviours.

In collaboration with

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# A RESEARCH-BASED SOLUTION FOR WASH ENTERPRISES

In collaboration with the Johns Hopkins Center for Communication Programmes (CCP), TRANSFORM, an impact accelerator led by Unilever, the UK's Foreign, Commonwealth and Development Office (FCDO) and EY, has developed a toolkit to help WASH enterprises grow their business by understanding and leveraging the relationships that exist within and around their organisations.

To inform the content of the toolkit, CCP collaborated with Toilet Engineers, a locally owned WASH-focused social enterprise operating from Wa Municipality in the Upper West Region of Ghana, to conduct research between April and September 2023.

The goal of the research was to understand the role of social networks and motivators for spreading information about WASH behaviours and products among members of a community. The research provided evidence on how social enterprises can identify influential people and networks within their customer base and strategically use them to accelerate safe WASH behaviours and increase the demand for related products and services.

By focusing on relationship building as a crucial step in business development, the toolkit helps enterprises understand how communication and information about products and services may flow through their customer base. Customers may influence their communities through information sharing, advocacy, and the purchase of WASH products and services within their community.

**Based on insights from the research, this toolkit offers practical steps to help WASH-focused enterprises engage with their customers and develop networks to:**

1. Increase their organisation's growth

2. Develop mutually beneficial relationships between service providers and the community

3. Improve community interest and discussion about WASH

4. Stimulate demand for WASH products and services

5. Track and assess progress towards business goals and behaviour change
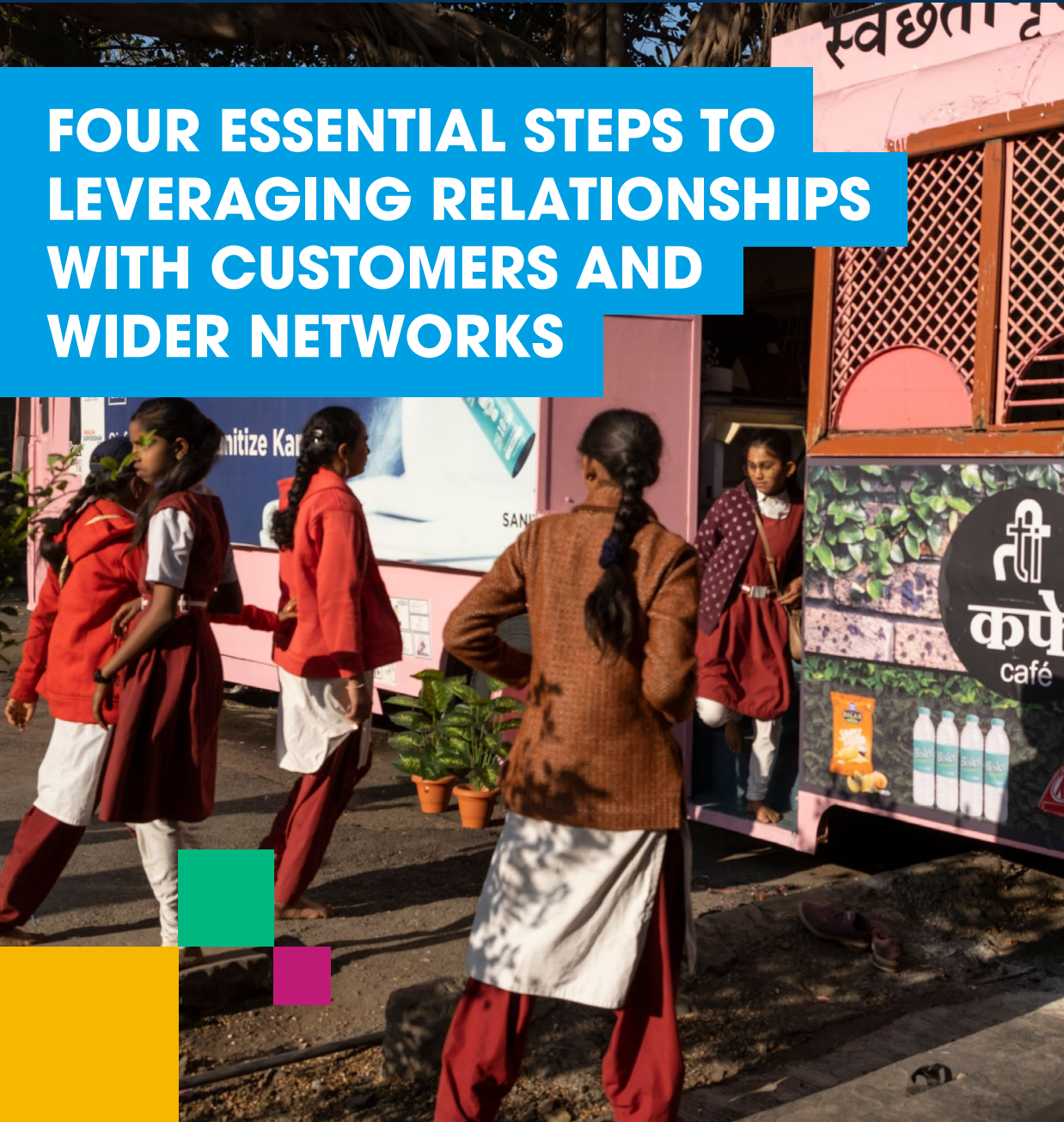
# FOUR ESSENTIAL STEPS TO LEVERAGING RELATIONSHIPS WITH CUSTOMERS AND WIDER NETWORKS

## STEP 1

### Understand how behaviour change and demand creation are linked

Understanding how to create positive behaviour change is essential for WASH enterprises to successfully create demand and ensure business longevity. By building relationships with and leveraging insights from customers, WASH enterprises can design more effective and tailored products, resulting in higher adoption rates and improved public health outcomes.

**INSIGHT 1** Behaviour change for business growth is a two-way street. Small businesses may have to reassess their priorities and the way they do business by changing their perceptions and interactions with their market base, how they design programmes and use their evidence strategically to achieve their objectives.

**INSIGHT 2** Behaviour change is dependent in part on effective communication, which helps a shift in perceptions, attitudes and actions. The quality of communication contributes to the success of the change that enterprises can achieve.

**INSIGHT 3** Behaviour change is never a one-off exercise – one small change in habit can have a ripple effect. For example, increased demand for toilets for women and girls could lead to increased demand for sanitary products. Enterprises should consider strategies to meet increased demand and support desired changes in behaviour.

## STEP 2

# Define and understand the customer base

Mapping out actors and key influencers within the target customer's community helps social enterprises identify the individuals or groups that can increase visibility, interest and use of their services or products.

**INSIGHT 1** Go beyond the traditional actors that influence the success of WASH initiatives. For example, in Ghana, the research identified that tenants of residential houses and religious leaders have high levels of influence on the use of WASH products and services. It also identified new actors including non-traditional groups such as artisans and steel benders, food vendors and market women, among others.

**INSIGHT 2** Increase interpersonal interactions with the customer base. While enterprises can work out customer needs based on experience and third-party research, they should not overlook the power of face-to-face engagements. Implement activities such as house-to-house visits, post-service follow-ups, and meetings with community-based religious and social groups to hear from customers first-hand.

**STEP 3**

# Develop strategies to leverage the power of communication

Increased opportunities for interactions and discussions about WASH help drive demand for WASH products and services.

**INSIGHT 1** Past customers often have the greatest reach and power to influence new customers. Enterprises should prioritise customer communication and segment their past customers based on demographics or purchase history, so they can easily tailor communications to their interests.

**INSIGHT 2** Media allows existing and future customers to 'see' their friends, family, neighbours and others like them using WASH products. This visible 'word of mouth' gives them the social permission to try innovations.

**INSIGHT 3** Trust and respect are determining factors for people when choosing with whom to discuss WASH-related needs. In addition to direct interpersonal engagement, enterprises could develop business promotion messages that are customer-facing and address customers' emotional and practical needs.

**INSIGHT 4** Enterprises should commit to providing regular updates to stakeholders, like customers and partners, and be open to receiving feedback.

## STEP 4

# Monitor progress for evidence and benchmark for improvements

Evidence is important for successfully engaging and building relationships. Customers need evidence to make purchase decisions, funders need it to justify their support to impact enterprises, and organisations need it to identify priorities and develop relevant interventions.

**INSIGHT 1** Businesses can only grow what they measure. Start with simple KPIs that a team can easily adopt and incorporate into business operations. Use KPIs to assess both successes and failures by providing critical insights into how well an enterprise is performing, whether it is meeting its objectives, and what actions can be taken to improve performance. Use customer relationship management (CRM) tools to track progress and revise KPIs objectively and systematically.

**INSIGHT 2** WASH-focused social enterprises can consider three broad KPI areas to cover various aspects of their business operation: **1. Financial performance**, **2. Organisational performance**, and **3. Health promotion and behaviour change of customers**. All staff members within a WASH enterprise should understand their role in monitoring and enhancing the progress of the business, and using the data to maintain good relationships with customers and other stakeholders.

**INSIGHT 3** Track customer interactions along the full product or service life cycle. Customer interactions could happen at multiple points – before, during, and after the product or service is offered, so enterprises should consider implementing multiple data collection approaches, tools, and time points.
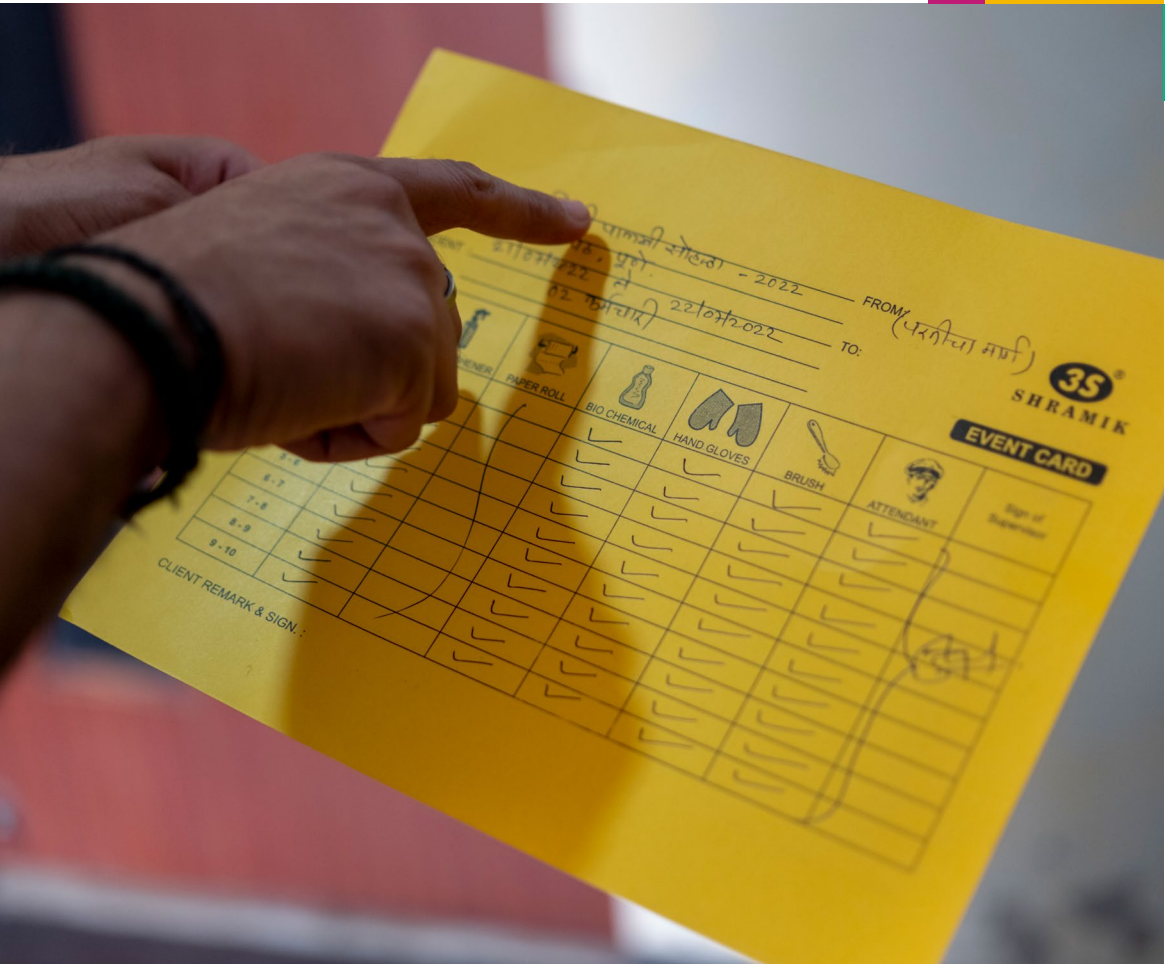
# WHAT'S NEXT FOR WASH ENTERPRISES?

Behaviour change is essential to expand the reach of WASH businesses and accelerate their impact on communities. Promoting safe and healthy WASH practices can influence increased sales and revenue, and can strengthen continuous engagement with customers who seek service maintenance, make business referrals to their family members and friends, and consider purchasing new products.

Traditionally, behaviour change initiatives focus on 'downstream' audiences such as individuals and families who benefit directly from WASH products and services. It is important to consider also the contributions from those who can carry the message and bring a unique influence, for example, businesses, leaders of community groups, landlords, tenants and more.

The private sector can play a key part in WASH initiatives, and bring additional capacity, funding and connections, which may result in a mindset shift for those involved.

Collaboration between WASH enterprises and the wider private sector can allow impact enterprises to scale their business faster through implementing community engagement for behavioural change initiatives, while the private sector can contribute to better public health and quality of life. The benefits are mutual.
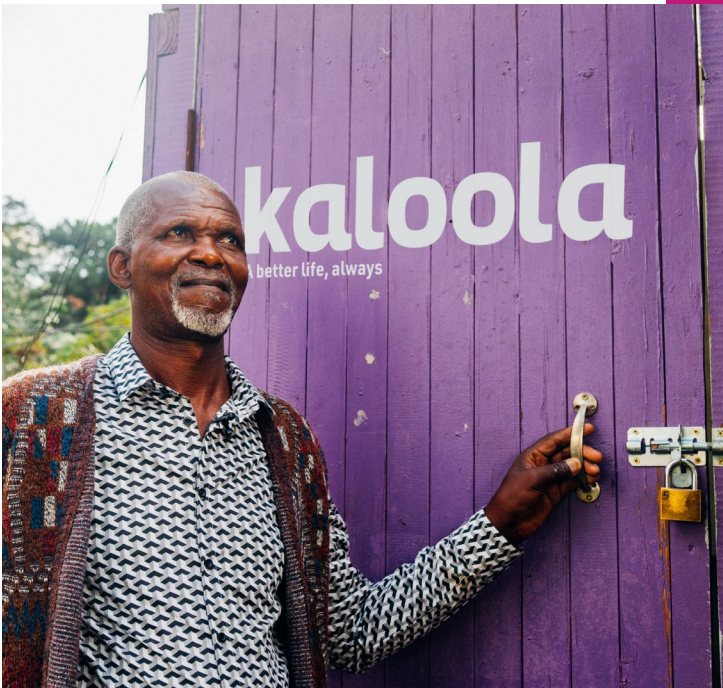
# INTRODUCTION

## PURPOSE OF THE TOOLKIT

The purpose of this toolkit is to strengthen connections between TRANSFORM grantees working within the WASH sector and the communities they serve. The toolkit helps WASH-focused social enterprises to grow their business by understanding and leveraging the relationships and connections that exist within and around their organisation. The toolkit provides guidance to WASH-focused social enterprises on how communication and information about their organisation's WASH-related products and services may flow through their customer base and influence behaviours including the purchase and use of toilets and washing stations.

The toolkit also helps social enterprises to identify and understand discussion networks and affiliations within the communities they serve and identify unique segments or key players within the community that could help to spread information about WASH and stimulate interest in available WASH products. It can help to identify communication bottlenecks as well as potential collaboration opportunities.

The toolkit will help WASH-focused social enterprises prioritise groups among their customer base that they could target for tailored messages that align with specific information needs. It can also help businesses develop targeted messaging and marketing strategies that resonate with their influential customer segments as well as other influencers who may be underrepresented.

## WHO MAY BENEFIT FROM THE USE OF THIS TOOLKIT?

The primary audience for this toolkit is social enterprises and small businesses working in the WASH sector in low- and middle-income country settings. Business development managers, programme managers and officers, monitoring and evaluation staff, marketing staff, and grassroots health and business promotion staff working to increase services at the community level may find this information useful for developing strategies for business growth and behaviour change.

The benefits of the toolkit are varied. It provides practical guidance and user-friendly resources (i.e. tool templates, resources) for effective goal-oriented engagement between WASH businesses and members of the communities they serve.

**These may include:**

- Identifying potential influencers for use of WASH services

- Strengthening customer relationships and engagement

- Promoting discussions and stimulating interest about WASH among customer bases

- Targeting customer groups with information that resonates with them

- Promoting WASH products and services through customer engagement and marketing.

While young and growing social enterprise organisations working in WASH arenas may benefit most from this toolkit, the approaches, principles, tools, suggestions and information are easily adapted to other social enterprises and small businesses operating without a health focus (i.e., education, literacy, youth development, and others).

## HOW THIS TOOLKIT WAS DEVELOPED

The information in this toolkit, including tools, resources and suggestions were derived from the results of research activities conducted with the support of the TRANSFORM programme and Unilever. The Johns Hopkins University Center for Communication Programmes, in collaboration with a locally owned WASH-focused social enterprise operating from Wa Municipality in the Upper West Region of Ghana, conducted three research activities to inform the content of the toolkit.

The research activities were conducted between April and June 2023 in Wa Municipality. Influence mapping among three groups (males, females, artisans) helped identify influential community actors for WASH-related decision-making in the community, social network analysis mapped the WASH-related discussion patterns among the organisation's consumer base, and outcomes monitoring from the organisation's monitoring data provided evidence on customer demographics and behaviour for strategic business planning.

Following a systematic research process that included gathering, analysing and compiling the data, critical insights were derived from the data to develop this toolkit.

# PREPARING TO USE THE TOOLKIT

Organisation culture, priorities and the operational environment have important influences on the successful application of the guidance in the toolkit. As this toolkit focuses on leveraging community and customer relationships for organisational business growth and improved WASH behaviours, social enterprises may find it useful to collectively think about their mission, business model and work culture and the placement of customer-focused activities within their business operations.

Employees of social enterprises may assess their organisation's mission, values, and business model for WASH with a goal of achieving a common understanding of the organisation's stance on business and customer priorities. For instance, members may assess the organisation's business model for balance between the social change aspect of the enterprise and the profit-making goals of business operations and clarify priorities for long-term growth. They may discuss the value placed on customer needs (for information, product preferences, affordable pricing, etc.) or whether there are opportunities to interact with and include customers in business planning. Some social enterprises may need to promote an ideological shift or agreement among their staff about whether there are social responsibilities to members of the communities they serve, what these responsibilities may be, and how they can be achieved.

The organisation's work culture regarding the use of evidence is another important consideration for successful use of the toolkit. Guidance in the toolkit is grounded in research results and also promotes the use of evidence for business planning and decision-making. Social enterprises that are committed to and invest in the collection and use of monitoring data for strategy planning, organisational growth, and to promote behaviour change will find this toolkit useful.



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# STEP 1

## UNDERSTAND BEHAVIOUR CHANGE AND DEMAND CREATION

Many social enterprises in health-focused arenas are concerned with promoting healthy behaviours and norms through the use of behaviour change interventions. In simple terms, behaviour change is about making long-term changes to habits and behaviours. In public health, behaviour change aims to increase the adoption of healthy habits and behaviours. For social enterprises working in the WASH sector, behaviour change may focus on increasing the purchase and use of WASH products such as toilets and hand washing stations, increasing the use of sanitation services such as residential garbage collection, or decreasing the practice of open defecation in a community.

## SOCIAL AND BEHAVIOUR CHANGE

Social and behaviour change (SBC) is a process involving individuals, communities or societies that enables them to adopt and sustain positive behaviours. This process involves promoting the facilitators and addressing the challenges and barriers to acceptance, adoption, and habitual practice of healthy behaviours and lifestyles for individuals and groups.

A key driver of SBC is communication. Social and behaviour change communication (SBCC) uses the power of communication to change perceptions, attitudes, behaviour and the lives of individuals, families, groups, generations, communities, countries, and even globally. It is the power to create healthy behaviours and new cultural norms and movements for health and a better overall quality of life.

SBC approaches include interpersonal dialogue, community engagement and mobilisation, advocacy, and behaviour change campaigns, among others. SBCC interventions may be delivered through edutainment, counselling, dialogue, and use of mass media (print, audio, visual, social, digital), among others. What is key to all these processes and activities is communication.

You can learn more about SBC **here.**

# BEHAVIOUR CHANGE AND DEMAND CREATION

SBC is important to social enterprises in the WASH sector because effective behaviour change interventions have been proven to create demand for services and use of commodities and products, and to promote healthy behaviours among the population. These are outcomes that are important to social enterprises working in the WASH sector.

In this regard, SBC can contribute to both the social and the business goals of the social enterprise. For example, behaviour change interventions that increase knowledge of the relationship between hand washing and prevention of diarrhoeal disease may create demand for washing stations in residences, schools, public places and others. Similarly, education on the risks of open defecation (safety, embarrassment, indignity, inconvenience, fear, etc.) compared to the benefits of having a toilet (convenience, privacy, dignity, ease, pride, etc.) may create demand for more toilets.

**Promoting positive behaviour change for WASH among an organisation's customer base may include:**

- Increasing positive perceptions about WASH behaviours.
- Increasing interest in acquiring WASH products and services.
- Increasing adoption and practice of WASH behaviours,
- Increasing advocacy for use of WASH products and services.

When including activities to promote behaviour change in a business plan, the organisation should consider strategies for meeting increased demand for related services. Supporting desired changes in behaviour helps sustain the new healthy behaviours and creates new norms.

**Social enterprises should consider developing behaviour change goals for their organisation that aim to improve their effectiveness or engagement with their customers. These may include:**

- Communicating more with existing and potential new customers.
- Routinely collecting and using evidence for business planning.
- Prioritising promotion of healthy WASH behaviours in business activities, among others.

Please refer to **Tool Template 1** (page 42) on assessing the organisation's position on customer engagement and behaviour change.

# STEP 2

## DEFINE AND UNDERSTAND THE CUSTOMER BASE

Social enterprise organisations must have clarity about the individuals and groups in the community that might help promote their services and organisation goals.

The customer base for WASH-focused social enterprises may differ based on factors such as geographic location, population demographics, cultural norms, and others. Mapping out the key influencers within the customer base helps social enterprises identify the key individuals and groups that may help them to promote interest and increase visibility and use of the services they provide.

## ACTORS IN THE WASH SECTOR

Important questions for social enterprises in the WASH sector include who are potential stakeholders? Who are potential influencers for the uptake of WASH products? and Who are the community advocates for WASH who can stimulate interest in WASH among individuals in the service area.

Research in peri-urban Ghana identified common, emerging, and 'hidden' or non-traditional influencers of WASH in community networks. The following is a summary of the community actors who were perceived to be important for access and decision-making about WASH.

See **Table 1: Community Actors for WASH** on the following page.

Social enterprises may identify and document the influencers within the communities they serve and among their customer base who may help them to promote discussion about WASH, engage with potential customers, and support the growth of the business.
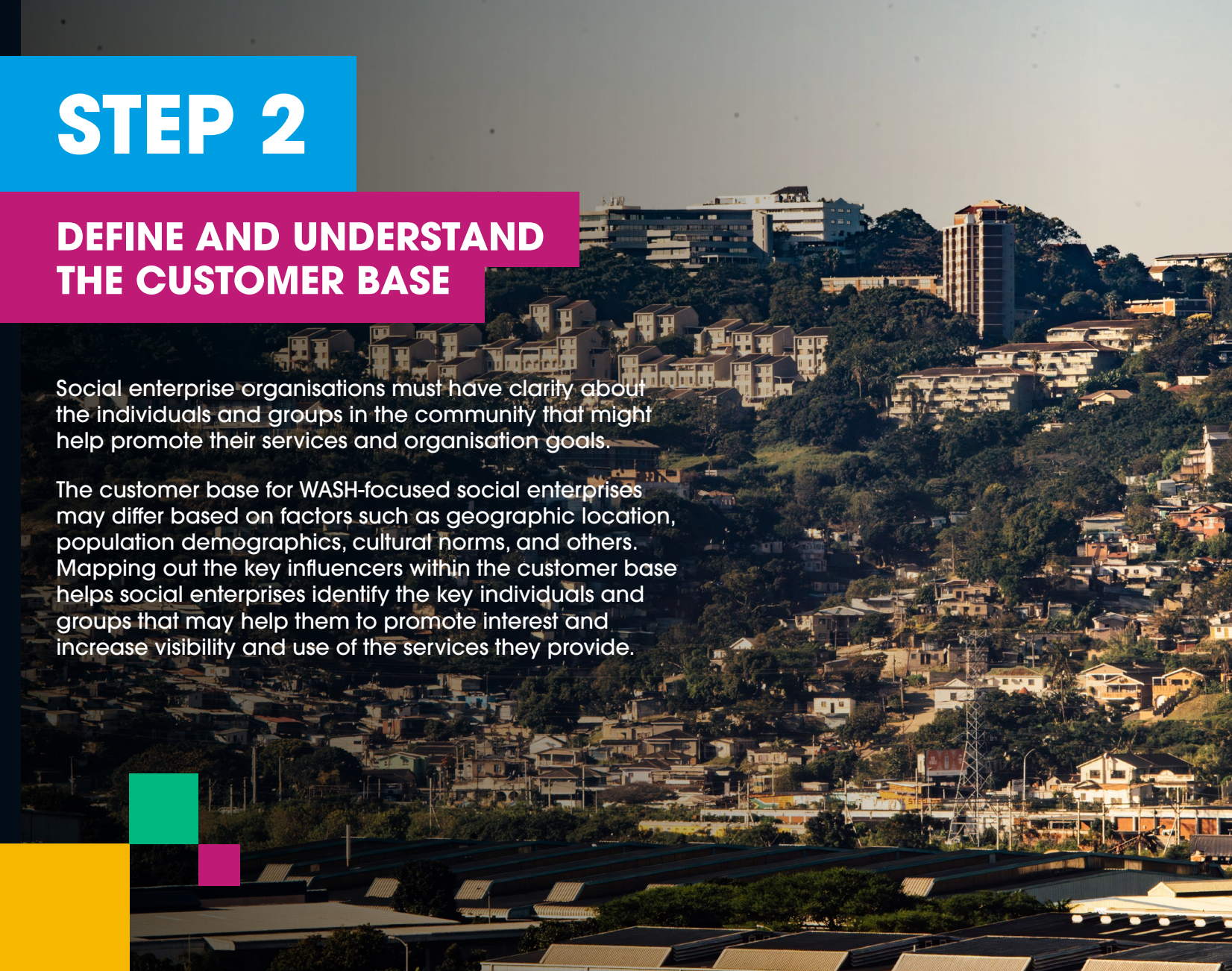
## TABLE 1: Community Actors for WASH

| Influencer Category | Examples of Members | Influence Role |
| --- | --- | --- |
| Artisans | Masons, plumbers, metalworkers, blacksmiths, carpenters, woodworkers, tilers. | Knowledge of WASH products, options, pricing, and instalment. Embedded in the community. |
| Civil Society | Business owners, toilet venders, private sanitation providers (both mobile and permanent), private school owners, community volunteers. | Specific knowledge of WASH service availability, needs, and wants. |
| Community Members | Household members, neighbours, youth groups, ad-hoc and informal leaders (arising during time of need). | Understand household, family, and community needs, priorities, and norms. |
| Community-based Organisations | Non-Governmental organisations, social services and welfare organisations, charities. | Community development. Sponsorship. Education about WASH. Advocacy and information campaigns. Social responsibility and community outreach initiatives. |
| Family | Head of household, spouse and partner, relatives. | Decision-makers. Allocation of resources. Shared responsibility and unique levels of trust. |
| Food Industry | Restaurant owners, market women, street/roadside food vendors. | High users of WASH services. Promote good hygiene practices to prevent disease. |
| Former Customers of WASH Social Enterprises | Locally and externally based individuals who have purchased for self or others such as family members in the past. | Experience with, and knowledge of, WASH-focused organisations and products. Promote discussions. Show purchased products. |
| Government | Health workers, sanitation workers, teachers, politicians, environmental health officers. | Education about WASH. Provide WASH services and lead communication campaigns. Conduct outreach during epidemics. Specific knowledge around waste collection, disposal, treatment, and maintenance of WASH products. |
| Health Experts | Environmental health officers and inspectors, health care workers. | Source of information about WASH. Knowledge related to disease prevention or waste disposal, promoting public health and WASH related behaviours. |
| Influential Individuals | Classmates, friends, workmates, neighbours, philanthropists, wealthy community members, politicians, architects, engineers, shop owners. | Trust and credibility. Shared interests and values. Relationships and emotional connections. |
| Landlords/Tenants | Residential and commercial tenants – apartment renters, retail business and office renters, healthcare facility owners, schools, hostels, low-cost hotels. | Amenities for renters. Desire to attract reliable renters. Responsible for tenant comfort and access to appropriate WASH services. |
| Local Leaders | Municipal and district assembly members (men and women), councilmen, religious leaders, traditional leaders, chiefs, queen mothers, informal leaders, village health committees. | Perceived as a credible source of information. Respected by the public for their opinion. Give approval for community projects. |
| Media Personalities and Journalists | Individuals and businesses that use radio, newspaper, television, and electronic and social media to reach audiences. | Highlight key WASH information including stories of people who use WASH products and the benefits to individuals, households, and communities. |
| Social Institutions | Women's groups, religious groups, student groups, community groups. | Establish and hold local accepted norms and values, regular meetings and presence within the community, hold collective responsibility and engagement. |

## The Role of Media

Media can and should be harnessed to influence the audience. Media can include social media, electronic media (websites), radio, or print media, among others. Media plays a large influencing role, together with the actors previously mentioned, as it has wide reach and can disseminate large amounts of information to a large audience. It has strong global or community connectivity and allows for real-time reporting and updating. Media is used for educational purposes as well as a source of entertainment and is often the start of new discussions or the promoter of innovative ideas or products. In addition to harnessing influencers, media can also be used in tandem to strengthen messaging, audience understanding, and improve audience outreach.

Media allows the audience to see their friends, family, neighbours, and others like them using new products and this gives them the social permission to try innovations. Certain media like SMS can amplify the 'word of mouth' which is important for providing peer support and validation when there is adoption of new behaviours.

## DEFINE THE CUSTOMER BASE

Through defining their customer base, social enterprises identify who their services are geared towards and the addressable market size that offers the optimal growth trajectory given available organisational resources. This helps with planning effective strategies for customer engagement and acknowledges that different individuals and groups have diverse levels of knowledge about WASH, information needs, expectations, and preferences for communicating and receiving and giving information.

Grouping customers based on shared characteristics, such as age, location, buying behaviour, or shared beliefs can provide insights into distinct customer segments. Identifying customers who can successfully refer others to the business or refer the WASH products or services can help target advocates who can help expand the customer base.
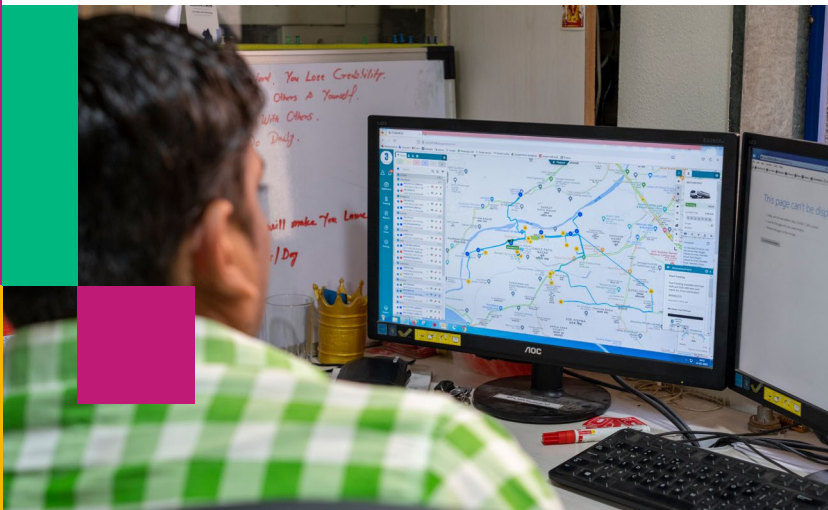


## Information about customers that may be helpful in defining the customer base include:

- **Where customers are.** The geographic location of customers such as urban, suburban, rural, etc.

- **Who customers are.**

- **The individuals and groups the business serves.**

- **What customers believe.** The prevailing values, perceptions, beliefs, and attitudes about WASH behaviours in the service area.

- **What customers know.** The knowledge levels about WASH, products, and options

- **What customers need.** The information about WASH and WASH products and services that customers are missing or seeking, and information that could interest and motivate discussions and purchase. This includes problems that WASH products can solve, customer challenges and goals etc.

- **How customers can be reached.** The preferred modes of communication among customers and those they consider to be credible sources of information.
  - How do customers become aware of the WASH products and services and the benefits they convey?
  - Include information about preferred communication channels, frequency of communication, preferred content, etc.

## Conduct a stakeholder analysis with your team

The stakeholder analysis matrix allows your team to identify individuals and groups critical in creating an enabling environment for WASH services for your targeted audience. A stakeholder analysis involves identifying, assessing, and understanding the interests, needs, and influence of individuals or groups who determine access and affordability of your product and services.

### The activity provides opportunity to identify:

- Stakeholder description- Primary purpose, affiliation, funding.

- Potential role in promoting WASH.

- Level of knowledge of WASH. Specific areas of expertise.

- Key players that have significant importance, impact, and influence.

It is important to go beyond the traditional and well-known actors that influence your organisation's success. International non-governmental organisations (INGOs) often are the first actors that are considered when making a stakeholder list. Make sure to include INGOs but consider other, 'hidden' or non-traditional actors that can help your organisation achieve your goals.

A few non-traditional actors include the skilled tradespeople hired to build the toilets, such as bricklayers and steel benders. Other actors that may be overlooked are included in Table 1 with their attributes listed for your consideration. If they are not influential actors in your community, simply remove them and add your own.

Refer to **Tool Template 2** (page 43) on mapping WASH users and stakeholders.

This template can be used to outline and list all potential stakeholders in the service area of the social enterprise. **Refer to Table 1 (page 17)** for traditional and hidden actors (users and influencers) that may be relevant for your enterprise and audience.

Once you have identified all the actors that can influence your organisation's success, categorise and prioritise them. Set a strategy and follow the actors that you determine are a high priority. If, after engaging and following up with the high priority actors, your goals are not met, engage with the medium and low priority actors.

Use the **Tool Template 3** (page 44) to identify your stakeholders.

# UNDERSTAND THE CUSTOMER BASE

After identifying individuals in the service area who use and/or may influence WASH-related interest and behaviours, organisations may increase their understanding of these individuals including their information needs about WASH and where they usually get their information.

This information can be derived from customer intake or registration forms, customer enquiry log records, questions and reviews posted to websites, questions asked during dialogue sessions and promotion events, and calls and visits made to the business offices. Maintaining a culture of data collection and record keeping and training staff to collect this information will provide the information to help organisations understand their customers and strengthen their relationships with them.

## Learning about the customer base

Social enterprises should take advantage of opportunities to learn about their actual and potential future customers residing in their business service catchment area. Analysis of this information helps the organisation to strategically position itself as a resourceful entity that is knowledgeable about the WASH-related needs and challenges faced by those it seeks to serve. Some of the ways that businesses can learn about their customers are:

**1 Collect client information during routine business interactions**

WASH-focused social enterprises may learn about customers and their needs during business interactions such as in-person, phone, and online enquiries about WASH products and services. It can also occur with current customers during points of sale or routine follow-up after installation. These interactions present opportunities for the organisation to collect information about participant demographics, and information, product and service needs. Receptionists, front desk staff, website managers and WASH promotion and outreach officers should be equipped and prepared to collect information from individuals with an interest in the organisation's services. Customer characteristics can then be used for future monitoring and evaluation.

**2 Collect organisation and behavioural monitoring data**

Tracking organisation activities and performance through monitoring of key performance indicators provides important opportunities for characterising the audience and capturing success and challenges. Appropriate monitoring data summarises progress towards organisation business goals, provides information on customer profiles, and may show changes in customer behaviour such as uptake of WASH services. Using monitoring data to understand your customer base and for business growth is discussed in detail in the chapter titled **STEP 4: Monitor your progress**.

**3 Increase interpersonal interactions with customers and communities**

Implementing activities that promote dialogue about WASH and its continuation after with others after interpersonal interactions are completed will help to stimulate community discussion and interest on the topic. House to house visits, community meetings, presentations to community-based, religious and social groups are ways to increase interpersonal interactions with potential customers. Including satisfied customers and content experts during these interactions may also help to increase community discussion and engagement for use of WASH products and services.
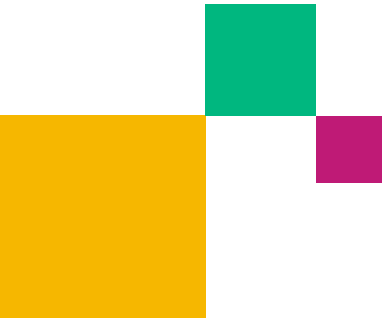
## 4 Use of other survey data

Access to other data on WASH in service areas may be useful in helping organisations to characterise their audience. This may include formal feedback from programme reports, national surveys, customer product and service reviews, interviews, group discussions and others, and may provide insights directly from the population served.

## 5 Leading community dialogue

Community dialogue is a proven effective SBC intervention and a great strategy to increase organisational visibility and promote business products and services directly to potential beneficiaries. Community dialogue can stimulate great discussion. Community members hear the varied perspectives and opinions of others like them and get to make informed decisions about WASH products and services. Social enterprises using community dialogue approaches must be well-prepared to respond thoroughly, persuasively, and yet empathetically to the concerns and questions of community members, and to present themselves and their services as an effective and feasible solution to the prevailing WASH challenges.

## 6 Seeking customer feedback

Customer feedback and reviews can also help organisations identify areas for improving their relationships with customers. Making post sale and post installation visits to discuss experiences with the new WASH products, level of satisfaction, and to encourage discussion and showing of products to others may generate increased discussions and contact with the business for new business.

When soliciting information from customers, it is important to explain the reasons for asking these questions. Emphasising the desire to accurately understand customer needs and realities, and to tailor services to specific needs of each customer is a good way to get their cooperation. This tool can be used to capture the characteristics of customers and their information and product needs. When used collectively with many customers, it may provide a working description of the needs of the individuals in the business catchment communities.
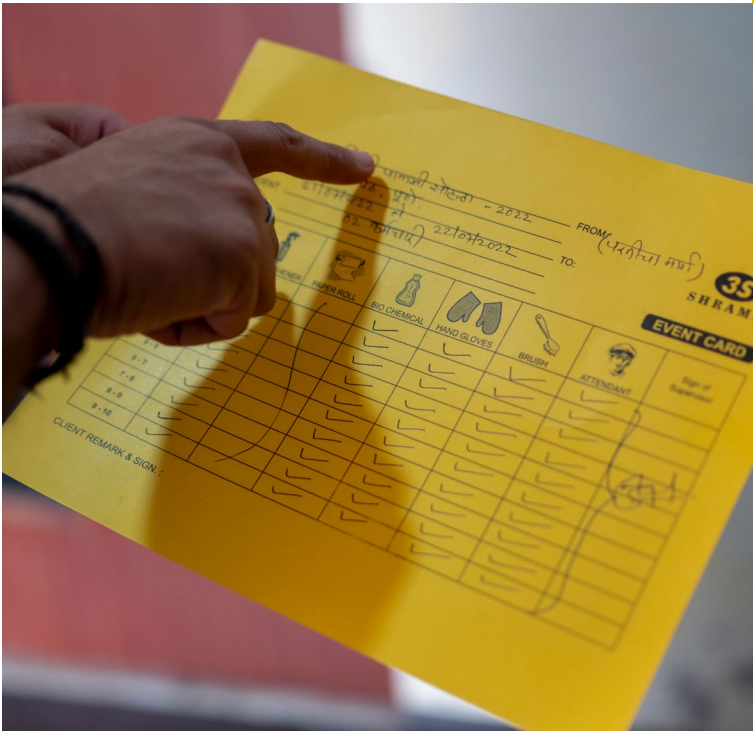


**Tool Template 4** (page 45) is an example of an intake assessment form that organisations may use during phone or in-person interactions to obtain information from customers about their needs regarding WASH products and services.

# STEP 3

## DEVELOP STRATEGIES TO LEVERAGE THE POWER OF COMMUNICATION

Knowledge of key influencers in the communities served by the social enterprise and their characteristics, needs, and preferences (STEP 2) may strengthen strategies to engage community members in WASH-related discussions, and increase demand for WASH products, sales and healthy behaviour change.
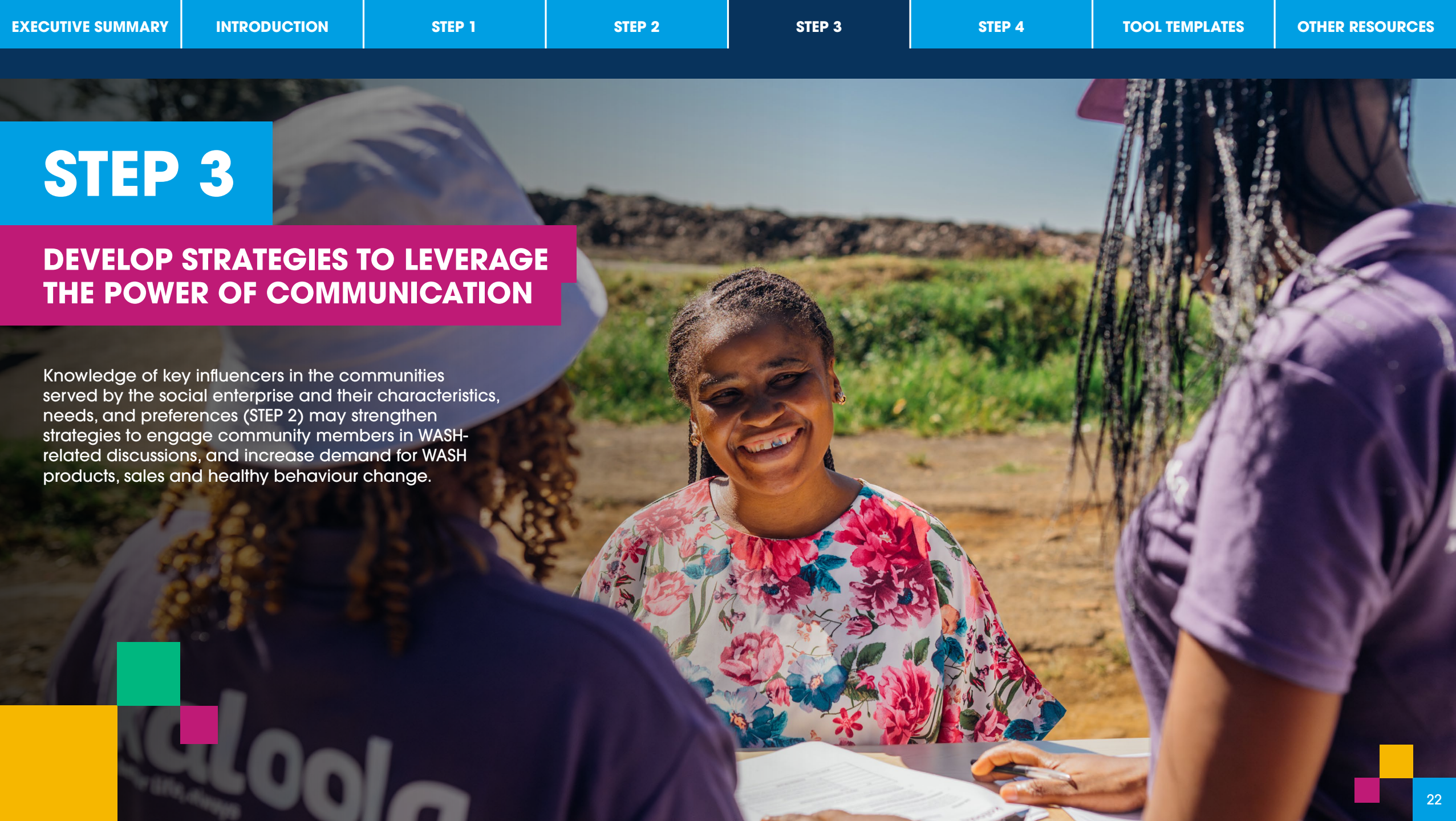
# INCREASE OPPORTUNITIES FOR INTERACTIONS AND DISCUSSIONS ABOUT WASH WITH CUSTOMERS

The research conducted showed that informative discussion contributed to the purchase of WASH products. There are many ways for social enterprises to stimulate discussion and interest in WASH products and services.



## Activity examples:

Organise **'open house'** sessions at the business for individuals to come in and browse products, talk with WASH experts, and ask questions.

**Raffle** off a free WASH product in the community.

Make **promotional presentations** with a question-and-answer session to local social, professional, and philanthropy groups.

Organise **community dialogue** sessions about WASH through village health committees and youth projects.

Provide a **free WASH product** to a key influencer or WASH champion in return for their active promotion of the product among family, friends, and the community-at-large.

Invest in a **WASH promotion officer** to increase the organisation's visibility at household and community level.

**Co-sponsor events** (sports, festivals, music, conferences, etc.) in return for time to promote organisational products and services to attendees during the activity.

Develop an annual community **'Walk for WASH'** day.

Participate in a discussion session on WASH through local **Community Information Center** radio.

Collaborate with health workers conducting community-based **WASH outreach** such as community health workers, public health officers, sanitation workers, environmental health officers, health volunteers, etc., and volunteer to be a part of the outreach team.

Sponsor a WASH **'question of the week'** on local radio to get people thinking and talking about a specific aspect of WASH behaviour or services.

Develop a **formal handover activity** for completed WASH products (toilets, washing stations) that are purchased, that includes discussion, information and education on product use and maintenance, and healthy WASH behaviours.

Make **follow-up visits** to business customers to assess satisfaction and encourage them to show their purchase and promote it.

Sponsor roaming **community-drama** on a WASH topic that includes messages about WASH behaviours and the organisation's business services.

Give visitors to the business site simple easy to understand **information resources** – FAQ documents, flyers, brochures etc., that they can use to initiate and drive discussions with others in their home and community.

The following questions may also help organisations develop customer engagement and communication strategies that complement the characteristics and needs of different customer segments and determine which approaches will best reach customers:

- **What would customers find most appealing?**

- **What/Who will best influence customers?**

- **What would be most effective in motivating change? Who do customers trust?**

- **Who would be most credible?**

- **What will best reach customers?**

- **What/Who could achieve the greatest impact?**

# INSIGHTS FROM RESEARCH ACTIVITIES

**The following insights from research activities are useful for identifying appropriate strategies for promoting discussion on WASH products and services:**

**1 Past customers had the greatest reach for WASH discussions in the discussion network**

Customers of the social enterprise may be effective advocates for and promoters of WASH business services. Strategies for involving them in business promotion include:

- **Encouraging** customers to show their new WASH products to family, friends, community members, and others, and to make referrals to the business.

- **Including** business branding information on the WASH product.

- **Educating** customers about WASH during product handover. Providing customers with simple user-friendly information (leaflets, flyers etc.) on health WASH behaviours that they can share with others.

- **Motivating** clients to promote business services during the one-month user satisfaction assessment.

- **Prioritising** customer communication and good relations, showing that your business values their input and experience because these customers are critical in promoting your products further.

- **Segmenting** your past customers based on demographics or purchase history, such as what type of product or toilet they purchased, so you can easily tailor future messaging and communications to their interest.

**2 Individuals had more discussion about WASH with others like themselves**

Organise talks and presentations to promote business services through professional and social groups with a shared identity such as:

- Landlord association
- Tenant groups
- Market women association
- Church community
- Youth groups
- NGOs and other groups with community development mandates
- Professional associations

**3 Individuals showed interest in both product options and reasons to use WASH products**

a. Working alongside health information experts may help to promote interest and dialogue on WASH behaviours at community level.

b. Organising business promotion meetings for the community that include other content experts such as healthcare workers, artisans, sanitation workers.

**4 Most discussions about WASH were held with family members and relatives, friends, and community members**

a. Organise discussions with families rather than single individuals.

b. Find ways to include 'friends' in WASH discussions and decision-making.

**5 Trust and respect were prevalent reasons for decisions on who to discuss WASH-related needs with. Many individuals also initiated discussions about WASH with family members first**

a. Develop business promotion messages that address the affective reasons of customers who want to discuss WASH.

   i. 'We respect your right to a dignified experience when you need to use the toilet'

   ii. 'You can trust us to satisfy your need for a high-quality affordable toilet and washing station'

   iii. 'You can trust us to help you to stay healthy and safe when you need to use the toilet'.

**6** **More frequently discussed WASH-related topics included the benefits of having a toilet, need for a toilet, practice of and risks from open defecation**

**a.** Collect information on topics of interest and reasons for purchase during initial interactions with customers and add it to the customer database.

**b.** Include information on salient topics of interest to the organisation's customer base, in business promotion activities.

**7** **Younger individuals and those who were single also lacked critical WASH information, were engaged in discussions, and purchased toilets and washing stations for personal use**

**a.** Promote WASH services to younger and unmarried individuals such as university students, young adults who are tenants, youth groups, in addition to the more traditional groups.

**8** **The volume of WASH-related discussions increased with increasing education**

**a.** Educated individuals were also considered to be resourceful for WASH-related information.

**b.** Engage groups with less education such as those with vocational degrees and primary schooling with personalised messaging with accompanying WASH-related education materials.

## Other questions for strategy development include:

- What times are best for customers?

- How often should communications be made?

- If mass media or social media are used, when will customers most likely to tune in? (watching TV, listening to the radio, accessing the internet, logging into on-line social networks).

- If community-based approaches are used, when will customers be available? Are there already established community events on which you can piggy-back activities?

- Consider the types of messages which will be used:
  – What information do customers want to learn about?
  – Which approaches are the most appropriate for conveying these messages?

- Combine multiple approaches to help increase reach and repetition of the messages. This will increase exposure and further reinforce the messages being delivered.
  – What mix of approaches will reach a large proportion of the customer base efficiently and effectively (and still fit within your budget)?



**Tool Template 5** (page 47) can help to organise enterprise strategy for continued engagement and communications with users of WASH products and services. The template will help to organise clear and measurable communication objectives and needs, identifying the most effective communication channels for each stakeholder group. This tool is helpful for maintaining positive relationships, fostering trust, and achieving long-term business success.

# Other communication strategy next steps to consider

## Ongoing and collaborative process:

- Stakeholder engagement and follow-up is part of an ongoing process that works best when integrated into the long-term social enterprise strategy.

- It is important to continuously assess and improve your communication and engagement strategies based on feedback and results. Remember to adapt to changing stakeholder needs and expectations.

- Commit to providing regular updates and information to stakeholders. This could include quarterly reports, monthly newsletters, or real-time notifications for example, depending on the audience's preferences.

- Be open to receiving feedback, questions, and concerns from stakeholders as this can reveal potential areas for improvement or improved audience engagement. This can involve surveys, comment boxes, suggestion portals, or regular touch-base meetings.

## Message development and personalisation:

- Craft tailored messages that resonate with each stakeholder group, their interests and concerns.

- Ensure your messages are clear, consistent, and aligned with your WASH business goals.

- Consider personalising communication to audience sub-groups where possible which enhances engagement and demonstrates a commitment to individual stakeholder needs.

## Engagement:

- Engagement can be through online, print, or in person approaches. Online groups or in-person groups including webinars, focus groups, or conferences can be helpful to connect stakeholders and gather valuable input.

## Measurement and evaluation:

- Implement key performance indicators (KPIs) to measure the effectiveness of your engagement and communication efforts. Monitor metrics such as engagement rates with a website, satisfaction scores, event attendance, calls received, mailing list growth, and feedback volume.

- Allocate sufficient resources, including staff, budget, and technology, to support ongoing M&E, stakeholder engagement and communication efforts.

# STEP 4

## MONITOR YOUR PROGRESS

This section will walk you through the steps and tools you want to consider. It aims to strengthen customer relationship management (CRM) by developing key performance indicators (KPIs) and accompanying tools for WASH. It helps you set sustainable growth targets for the organisation and monitor your successes objectively and systematically.

## PREVAILING BUSINESS IMPRESSIONS

### 'We are doing great!' (Or not? Can you do better?)

You think you know how successful your WASH social enterprise is doing. You are selling your products and services steadily and you know how many customers bought them. In addition, your customers seem generally happy as you receive kudos and rarely hear them complaining. You believe you are having a positive influence on their WASH behaviours in the community. You say to yourself, 'We are doing great!'

One day, you were talking to a few prospective customers, and they asked, 'Can you tell us a little more about how your business is doing?' So, you replied, 'We are doing great!' Then, one continued, 'How great are you doing, and how do you know about it?' You had to pause for a while to think about what you could say without making your potential customers disappointed.

You managed to get through the conversation by sharing some basic numbers (e.g., the number of products sold this past month, etc.) and intuitive knowledge of what your customers would say (e.g., we are pleased with your product, our family members are now healthier, etc.). However, this incident made you realise you need to monitor your business performance and influence WASH behaviours objectively and systematically so you can comfortably say, 'We are doing great!' because you have the evidence.

# RESOURCE NEEDS

The routine use of evidence is important to a successful monitoring programme and to ensure that it is necessary to address various resource needs upfront. As for human resources, all staff members should understand they have a role in monitoring the progress of your social enterprise. In particular, the leadership of the social enterprise, including the full-time research and monitoring officer and promotion and marketing officer, should establish a clear mission, vision, and objectives to inform the monitoring process and system.

Regarding specific tasks, including data collection, cleaning, coding, and analysis, it would be helpful to have a few staff members (e.g., interns from local universities) under the close supervision of the research and monitoring officer. Regarding monitoring platforms and tools, you can consider free options (e.g., Google Workspace, Microsoft Office 365) to design simple tools illustrated in this section.

# KEY PERFORMANCE INDICATORS (KPIS)

Key performance indicators (KPIs) refer to a set of quantifiable measurements used to gauge the overall performance of an agency, company, social enterprise, and such. KPIs specifically help determine strategic, financial, and operational achievements (source: Investopia.com). Being measurable, KPIs are used to assess both successes and failures by providing critical insights into how well an agency is performing, whether it is meeting its objectives, and what actions can be taken to improve performance (source: Evalcommunity.com).

KPIs should be linked to the specific goals and objectives of an agency. In addition, for WASH-focused social enterprises, it is essential to tailor KPIs for WASH products and services and to incorporate WASH-related behavioural aspects



## Selection of KPIs

**WASH-focused social enterprises can consider three broad KPI areas as illustrated below:**

1. KPIs can examine **financial performance**. They can be simple indicators such as the sales volume and payment schedule, especially for small and start-up businesses. The larger and more established companies may use more sophisticated financial KPIs such as net profit (or the bottom line, gross profit margin), revenues minus certain expenses, or the current ratio (liquidity and cash availability) (source: Investopia.com).

2. KPIs can monitor **organisational performance**. They should be customer-focused by looking at the reach and growth of the customer base. Other key areas include customer satisfaction and customer retention.

3. KPIs can assess social objectives, specifically how your commercial strategies are also bringing benefits to society, by looking at **behaviour change and health promotion** activities.

For each sub-area under the three broad categories described above, two to three KPIs can be selected – see **Illustrative Example 1** on the following page.

## Illustrative Example 1: List of KPIs for WASH Enterprises

### 1 Financial performance

**1.1. Sales volume**

1.1.1. Proportion of expected sales for the year made or accrued.

**1.2. Payment schedule**

1.2.1. Proportion of all customers who signed a contract in the last three months and completed the payment.

1.2.2. Proportion of current customers with an unpaid balance that have paid on time in the last three months.

### 2 Organisational performance

**2.1. Reach**

2.1.1. Number of promotion and marketing activities conducted in the last month (inc. social media engagement, mass media, posters, flyers, community meetings, etc..) in the last month.

2.1.2. Number of individuals reached with promotion and marketing activities in the last month.

**2.2. Growth**

2.2.1. Percentage increase in the number of new client inquiries for goods and services in the last three months.

2.2.2. Percent increase in the number of new clients with a signed contract in the last three months.

2.2.3. Number of toilet and handwashing facilities with construction completed in the last three months.

**2.3. Referrals**

2.3.1. Number of new clients referred in the last quarter.

2.3.2. Proportion of new clients that were referred in the last quarter.

**2.4. Satisfaction**

2.4.1. Proportion of new customers reporting that they are satisfied/very satisfied with the completed product during one month assessment.

2.4.2. Proportion of new customers reporting they will likely/very likely refer the social enterprise to others, during one month assessment.

### 3 Behaviour change and health promotion

**3.1. Menstrual hygiene**

3.1.1. Number of individuals who received information about menstrual hygiene from the social enterprise staff in the last three months

3.1.2. Number of individuals who received information about safe disposal of used menstrual hygiene products from the social enterprise staff in the last three months

**3.2. WASH**

3.2.1. Number of individuals who received information from the social enterprise about the care of their new WASH facility(ies) in the last three months (by topic: correct use, maintenance, cleanliness, waste evacuation, etc.)

3.2.2. Number of individuals who received information from the social enterprise about the recommended times to wash hands in the last three months

3.2.3. Proportion of the social enterprise customers who received information about WASH who report that they:

- have no intentions to practice open defecation
- will advocate for use of toilets in the community

# KPI WORKSHEET

Each KPI needs a detailed definition, an explanation for calculation, and other details. Additionally, it is essential to use a worksheet to develop information explaining how and when data will be collected on the KPIs to standardise the data tracking and assessment process and ensure consistency over time. Table 2 lists the helpful categories to include in the KPI worksheet as a template format (**Tool Template 6**). In addition, **Illustrative Example 2** showcases the KPIs for WASH social enterprises (from **Illustrative Example 1** above) along with the three categories: definition, calculation, and disaggregation.

## TABLE 2: Categories in the KPI Work Sheet

| Categories | Purpose and Use |
|---|---|
| Definition | To have a common and clear understanding of each KPI. |
| Calculation | To define a unit of measure and explain how each KPI should be calculated. |
| Disaggregation | To specify ways to separate data into smaller units to elucidate underlying trends and patterns. |
| Data source | To specify the location where data originates from, e.g., the initial location where data is born or where physical information is first stored . |
| Baseline | To identify average performance levels at a set time to compare changes in KPIs over time. |
| Target | To measure progress against a goal to be achieved for each KPI. |
| Frequency of data collection | To specify the rate at which data is collected at regular intervals. |
| When to analyse | To specify how often the data is analysed to identify whether the targets are achieved and to extract useful information for decision-making. |



Please refer to **Tool Template 6** (page 48) for the KPI worksheet template.

## Illustrative Example 2: KPI Worksheet (Showing Definition, Calculation, Disaggregation, and Data Source)

| Key Performance Indicators | | | Definition | Calculation | Disaggregation |
|---|---|---|---|---|---|
| **1** **Financial Performance** | **1.1** **Sales volume** | 1.1.1. Proportion of expected sales for the year made or accrued. | This indicator measures the proportion of the sales from the products and services accrued in the expected sales set as the year's target.<br><br>Sales 'accrued' include the amount (in local currency) that has been recognised by the social enterprise, but which has not yet been received. | **Numerator:** Total of sales made for the year.<br><br>**Denominator:** Total amount of expected sales (target) for the same year. | |
| | **1.2** **Payment schedule** | 1.2.1. Proportion of all customers who signed a contract in the last three months and completed the payment. | 'Customers' refer to the individuals who have signed a contract to purchase a toilet or handwashing station. Each customer should be given a unique ID to avoid duplication and double counting.<br><br>'Completed payment' indicates NO additional money owed by a customer to the social enterprise. The balance should be zero (0). | **Numerator:** Number of customers who signed a contract in the past three months and have a zero-balance owed on account.<br><br>**Denominator:** Number of customers who signed a contract in the last three months and have future payments. | **As needed:** sex, age range, toilet type, setting type, etc. |
| | | 1.2.2. Proportion of current customers with an unpaid balance that have paid on time in the last three month. | 'Paying on time' is based on the payment schedule agreement made between the social enterprise and each customer, and the payment status needs to be assessed and updated regularly. | **Numerator:** Number of customers with an unpaid balance that have paid on time in the last three months.<br><br>**Denominator:** Total number of customers having an open account with a balance left. | **As needed:** sex, age range, toilet type, setting type, etc. |
| **2** **Organisational performance** | **2.1** **Reach** | 2.1.1. Number of promotion and marketing activities conducted in the last month (inc. social media engagement, mass media, posters, flyers, community meetings, etc.) in the last month. | Includes all activities led by the company to promote and market the products and services to attract new and retain current customers.<br><br>Activities may be counted from posters, flyers, community meetings, social media advertisements (WhatsApp, Facebook, Instagram), mass media, etc. | Count the number (frequency).<br><br>Add the output numbers for all activities in each month. | **Media type:** social media engagement, mass media, posters, flyers, community meetings, etc.<br><br>**Location:** Upper West vs. Out of Upper West. |

| Key Performance Indicators | | | Definition | Calculation | Disaggregation |
|---|---|---|---|---|---|
| **2**<br>**Organisational performance**<br>(continued) | **2.1**<br>**Reach**<br>(continued) | 2.1.2. Number of individuals reached with promotion and marketing activities in the last month. | Includes all individuals reached by the promotion and marketing activities (indicator 2.1.1).<br><br>Individuals may be counted from social media groups, community meeting attendees, email listservs, door-to-door promotions. | Count the number (frequency).<br><br>Add all individuals who are reached through the different channels. | **Customer type:** family size, gender, age range.<br><br>**Promotion type:** social media groups, community meeting attendees, email listservs, door-to-door promotions.<br><br>**Location:** Upper West vs. Out of Upper West. |
| | **2.2**<br>**Growth** | 2.2.1. Percentage increase in the number of new client inquiries for goods and services in the last three months. | Includes all individuals who made inquiries about sanitation products and services.<br><br>Percent Increase (relative change) is calculated as quarter-to-quarter growth. | **Numerator (increase):** Subtract the number of new client enquiries made in the previous three-month period (e.g., April to June 2023 / the quarter just ended) from the number of client enquires made in the previous three-month period (e.g., January to March 2023 / the last quarter).<br><br>**Denominator (original number):** Number of client enquiries made in the previous three-month period (e.g., January to March 2023 / the last quarter). | **Location:** Upper West vs. Out of Upper West. |
| | | 2.2.2. Percentage increase in the number of new clients with a signed contract in the last three months. | Includes all individuals who signed a contract to purchase and/or have a toilet constructed.<br><br>Percent Increase (relative change) is calculated as a quarter-to-quarter growth. | **Numerator (increase):** Subtract the number of new clients with a signed contract in the previous three-month period (e.g., April to June 2023 / the quarter just ended) from the number of client enquiries made in the previous three months period (e.g., January to March 2023 / the last quarter).<br><br>**Denominator** (original the previous three-month period (e.g., January to March 2023 / the last quarter). | **Customer type:** family size, gender, age range.<br><br>**Location type** |
| | | 2.2.3. Number of toilet and handwashing facilities with construction completed in the last three months. | Includes all toilet and handwashing facilities that had completed construction.<br><br>Completed construction means the toilet is ready for use (and may or may not have been handed over to the client). | Count the number (frequency). | **Facility type:** toilet, wash station.<br><br>**Toilet type:** digester, micro flush.<br><br>**Setting type:** urban, peri-urban, rural.<br><br>**Location:** Upper West vs. Out of Upper West |

| Key Performance Indicators | | | Definition | Calculation | Disaggregation |
|---|---|---|---|---|---|
| **2**<br>**Organisational performance** (continued) | **2.3**<br>**Referrals** | 2.3.1. Number of new clients referred in the last quarter. | Refers to all individuals who were referred to the social enterprise by any individual, including past and current customers. | Count the number (frequency). | |
| | | 2.3.2. Proportion of new clients that were referred in the last quarter. | This indicator measures the proportion of new clients who reported that they were referred to the agency. Referees could be a past and current client or anyone else. | **Numerator:** Number of new clients who were referred to the agency in the last three months (customers who received referral).<br><br>**Denominator:** Number of new clients in the last three months. | **Type of Referee:** past client, current client, unrelated to the agency. |
| | **2.4**<br>**Satisfaction** | 2.4.1. Proportion of new customers reporting that they are satisfied/very satisfied with the completed product during the one-month assessment. | Customer Satisfaction Score (CSAT) Score: a customer experience metric that measures happiness with a product, service, or customer support interaction. (Source: Qualtrics). | **Numerator:** Number of customers reporting that they are 'satisfied' or 'very satisfied'.<br><br>**Denominator:** Total number of customers assessed at one month follow-up. | **Demographic data** (sex, age range, urban/rural residence).<br><br>**Toilet type** |
| | | 2.4.2. Proportion of new customers reporting they will likely/very likely refer the social enterprise to others, during the one-month assessment. | Net promoter score (NPS): a customer loyalty metric that gauges how willing a customer is to recommend a product or service. (Source: Qualtrics). | **Numerator:** Number of customers reporting that they are 'likely' or 'very likely' to recommend the agency.<br><br>**Denominator:** Total number of customers assessed at one month follow-up. | **Demographic data** (sex, age range, urban/rural residence).<br><br>**Toilet type** |
| **3**<br>**Behaviour change and health promotion** | **3.1**<br>**Menstrual hygiene** | 3.1.1. Number of individuals who received information about menstrual hygiene from the social enterprise staff in the last three months. | Information about menstrual hygiene includes puberty and what it is, reproduction, stigma, and complications and when to see a doctor.<br><br>Includes only individuals that receive information through verbal instruction and /or material resources on menstrual hygiene from the social enterprise staff. Information may be received from menstrual hygiene coordinator, during in-person or group education sessions in households or community meetings. | Count the number (frequency). | **Demographic data** (sex, age range, urban/rural residence). |

| Key Performance Indicators | | | Definition | Calculation | Disaggregation |
|---|---|---|---|---|---|
| **3**<br>**Behaviour change and health promotion**<br>(continued) | **3.1 Menstrual hygiene** (continued) | 3.1.2. Number of individuals who received information about safe disposal of used menstrual hygiene products from the social enterprise staff in the last three months. | Count only includes individuals that:<br><br>• receive information through verbal and/or material resources on disposal of menstrual waste from the social enterprise staff;<br><br>• receive specific content on how to permanently discard or dispose of used menstrual hygiene products such as tampons, store-bought sanitary pads, and other self-made barriers (fabric, cardboard, leaves, etc.). | Count the number (frequency). | **As needed**: sex, age range, urban/rural location, toilet type, setting type, etc. |
| | **3.2 WASH** | 3.2.1. Number of individuals who received information from the social enterprise about the care of their new WASH facility(ies) in the last three months (by topic: correct use, maintenance, cleanliness, waste evacuation, etc.). | Count only includes individuals that receive information on how to care for a structure that was constructed by the social enterprise.<br><br>Information includes education provided verbally or through resource documents about the correct use and maintenance of the facility, and future evacuation of waste pit.<br><br>WASH facility includes toilets and hand washing stations constructed by the social enterprise. | Count the number (frequency). | **As needed**: sex, age range, toilet type, setting type, etc. |
| | | 3.2.2. Number of individuals who received information from the social enterprise about the recommended times to wash hands in the last three months. | Count only includes individuals that receive information and resources about appropriate hand washing from the social enterprise.<br><br>Appropriate handwashing refers to the recommended times to wash hands that are endorsed by WHO for global practice:<br><br>• After using the toilet<br><br>• Before and after eating<br><br>• After handling garbage<br><br>• After touching animals and pets<br><br>• After changing babies' diapers or helping children use the toilet<br><br>• When your hands are visibly dirty. | Count the number (frequency). | **As needed**: sex, age range, toilet type, setting type, etc. |

| Key Performance Indicators | | | Definition | Calculation | Disaggregation |
|---|---|---|---|---|---|
| **3** Behaviour change and health promotion (continued) | **3.2 WASH** (continued) | 3.2.3. Proportion of the social enterprise clients who received information about WASH who report that they: 1. have no intentions to practice open defecation. 2. will advocate for use of toilets in the community. | Open defecation refers to going to the toilet on the ground and in any manner that does not include the use of a toilet. Advocating for the use of toilets means individuals share information about the benefits of, and need to use toilets, through any channels. | **Numerator:** Number of the social enterprise customers who received information about toilet use who are confident that they will not practice open defecation. **Denominator:** Number of the social enterprise customers who received information about use of toilets. **Numerator:** Number of the social enterprise customers who received information about toilet use who are confident that they can advocate for use of toilets in the community. **Denominator:** Number of the social enterprise customers who received information about use of toilets. | **Demographic data:** sex, age range, urban/rural residence. |

## CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SYSTEM

You will need to develop a main platform to organise the data from various sources for the KPIs. In the business field, including WASH-focused social enterprises, a main platform is often called Customer Relationship Management (CRM), tracking and analysing customer interactions to enhance customer experience, gain greater customer insights, and streamline marketing and sales. A main CRM can be a master file including the following spreadsheets and consolidating all required data for key performance indicators (KPIs) as shown in **Illustrative Example 3** on the right.

Customer interactions could happen at multiple points – before, during, and after the product or service is offered. For that reason, it is important to design and implement several data collection forms. Those forms are also listed in Illustrative Example 3 under 'accompanying data collection tools' (as they are focused on customer interactions) and 'additional tools for consideration' (as they are not linked to individual customers but aim to document community-based activities).

### Illustrative Example 3: Customer Relationship Management (CRM) Design

| Name of CRM Forms and Sheets | Description | When to Use |
|---|---|---|
| **CRM: Master File**<br><br>**CRM = Customer/Client Relationship Management** | It is a master file including the following spreadsheets and consolidating all required data for key performance indicators (KPIs).<br><br>A. Client ID<br><br>B. CRM<br><br>    B1. Contact and Demographic Information<br><br>    B2. Production Information<br><br>    B3. Payment and Referral Status<br><br>    B4. WASH Facility Handover<br><br>    B5. One Month Assessment<br><br>C. WASH Product/Service Request and Follow-Up Assessment<br><br>    C1. Product/Service Request<br><br>    C2. Product/Service Follow-Up Assessment. | Ongoing record keeping. |
| **Accompanying Data Collection Tools** | | |
| **WASH Facility Handover Form** | This form is used upon the completion of the WASH facilities and during the final inspection/handover meeting with the client. There are five key topic areas that align with the KPIs developed and the expected analysis:<br><br>1. Administrative Information<br><br>2. Client Demographics<br><br>3. Expected Time for Construction<br><br>4. Client Satisfaction and Referral Intention<br><br>5. Behavioural Intentions (Likelihood). | Upon the completion of WASH facilities. |

| Name of CRM Forms and Sheets | Description | When to Use |
|---|---|---|
| One Month Assessment Form | This form is used during the one-month follow-up call/visit. There are five key topic areas that align with the KPIs developed and the expected analysis.<br><br>1. Administrative Information<br>2. Client Demographics<br>3. Product Check<br>4. Client Satisfaction and Referral Intention<br>5. Change in Behaviour and KAP. | One month-after the completion of WASH facilities. |
| WASH Product/Service Request and Inquiry | This form is used when a social enterprise staff speaks with a customer/client because:<br><br>• an existing customer/client has made a request for a service, AND/OR<br>• an existing or 'potential/new' customer made an enquiry about constructing new WASH facilities. | When the WASH product/service inquiry or request is made by a client. |
| WASH Product/Service Request Follow-Up | This form is used when a social enterprise staff makes a follow-up call or visit to further discuss and assess the product/service request. | When the WASH product/service follow-up or assessment is conducted by a staff. |
| **Additional Data Collection Tools for Consideration** | | |
| Promotion and Marketing Tracking Form | This form is designed to collect the data on KPIs by tracking promotion and marketing activities to strengthen and broaden the company's client reach. | Ongoing to capture promotion and marketing activities. |
| Health Promotion and Education Tracking Form | This form is designed to collect the data on KPIs listed by tracking health promotion and education activities to increase WASH knowledge and foster healthy WASH behaviours in communities. | Ongoing to capture health promotion and education activities. |

It is important to identify specific codes and data format (e.g., text, numeric, date, etc.) for each category (variable) during the CRM development stage, especially if you have several staff members to populate the CRM form to keep the data consistent, as shown in **Tool Template 7** and **Tool Template 8** (page 49 and page 50).

# VISUALISING AND USING DATA TO INFORM THE CUSTOMER ENGAGEMENT STRATEGY

Data visualisation is the representation of data through use of common graphics, such as charts, plots, infographics, and even animations. These visual displays of information communicate complex data relationships and data-driven insights in a way that is easy to understand (source: IBM.com).

After you populate your CRM forms, you will be able to visualise useful data so that you can easily see and understand the characteristics, trends, patterns, and relationships of your customers. Data visualisation can help you quickly leverage what you learned to promote WASH products, services, knowledge, and healthy behaviours by presenting the data in a format that is easily shared and explored.



Image source: https://thenewstack.io/7-best-practices-for-data-visualization/

## Growth Strategy through Strengthening Relationships

The key challenge that most social enterprises face, especially in their startup phase, is a scarcity of time and financial resources. For this reason, it is critical that social enterprises clearly define and document their path to growth and focus their time and money in specific marketing actions that deliver the most cash flow to sustain growth.

There is not a one-size-fits-all approach to business growth, however there are guiding principles that may be useful.

**1  Define sustainable goals and measures of success for your organisation**

Questions that may help you to develop appropriate and feasible measures include: What is the market size, number of customers, monthly or annual sales, number of influencers or other selected metrics that you will use to measure performance?

**2  As you roll out your product, think of partners that can provide strong support for how you engage with your customer base**

**3  Ensure you take full advantage of opportunities to keep your customers satisfied with your products and services**

Also take every opportunity to upsell and get their referrals. Involving satisfied clients in business promotions has the potential to increase the scale and scope of business operations. What are the key customer touchpoints from acquisition, installation, payments, maintenance and replacement? What are the standard operations procedures for these touchpoints that ensure a satisfactory customer experience?

**4  Seek permission and approval from hierarchical influencers but engage natural leaders as change champions**

Key community influencers often derive their status by maintaining the social status quo. Organisations need their tacit support to achieve social change. On the other hand, natural leaders are usually peers with influence who have more access to the community. Engaging them as champions, including recruiting them as sales agents, can be a powerful strategy for driving adoption of new behaviours including purchase of WASH products.

**5  You can only grow what you measure**

Start with simple indicators that your team can easily adopt and incorporate in business operations. Incorporate the guidance on organisation and behavioural monitoring included in this toolkit.

**6  Talk to your team**

Have frequent discussions with your customers and stakeholders to learn about the changing needs of your customer base and adjust your market strategy as needed. Nothing is more impressive to a potential customer than someone who knows all about their realities and who cares enough to put them first.

# TOOL TEMPLATES

# TOOL TEMPLATE 1: ASSESSING THE ORGANISATION'S POSITION ON CUSTOMER ENGAGEMENT AND BEHAVIOUR CHANGE

**Download Tool Template 1 here**

| Organisation culture | Incorporated within the organisation structure and business model | Organisation activities that promote customer engagement through routine organisation operations and activities |
|---|---|---|
| Customers are prioritised and front-facing in the organisation | | |
| Supports behaviour change among staff of the social enterprise | | |
| Supports behaviour change among the customer base | | |

# TOOL TEMPLATE 2: MAPPING WASH USERS AND STAKEHOLDERS

**Download Tool Template 2 here**

| Name of organisation, group, or individual | Description of organisation, group, or individual | User and/or Influencer | Potential role in promoting WASH products and services |
|---|---|---|---|
| **Government sector** | | | |
| | | | |
| **Political sector** | | | |
| | | | |
| **Commercial sector** | | | |
| | | | |
| **Non-governmental sector** | | | |
| | | | |
| **Other civil society target audiences** | | | |
| | | | |
| **International donors** | | | |
| | | | |
| **Influential individuals** | | | |
| | | | |
| **Other** | | | |
| | | | |

# TOOL TEMPLATE 3: PRIORITISING KEY INFLUENCERS

**[Download Tool Template 3 here](#)**

| Users and Stakeholder organisation, group, or individual | Priority Level<br><br>What actors are the most important to your organisation and/or community? Rate each actor as high, medium, or low | Justification for Rating<br><br>Perceived level of influence in community, potential contributions to customer engagement and business growth of the social enterprise | Area of expertise. How they can contribute to promoting WASH in the service area |
|---|---|---|---|
| **Government sector** | | | |
| | | | |
| **Political sector** | | | |
| | | | |
| **Commercial sector** | | | |
| | | | |
| **Non-governmental sector** | | | |
| | | | |
| **Other civil society target audiences** | | | |
| | | | |
| **International donors** | | | |
| | | | |
| **Influential individuals** | | | |
| | | | |
| **Other** | | | |
| | | | |

# TOOL TEMPLATE 4: CUSTOMER ASSESSMENT

**[Download Tool Template 4 here](#)**

| Date:<br>Name of Customer:<br>Customer Contact Information:<br>Type of Interaction: | | Intake Staff Name: |
|---|---|---|
| **Domain of Enquiry** | **Assessment Questions** | |
| **Demographics** | Age | |
| | Sex | |
| | Education Level | |
| | Marital Status | |
| | Community of Residence | |
| | Location (Urban, Rural) | |
| | HoH/Decision Maker in Household? | |

| Domain of Enquiry | Assessment Questions |
|---|---|
| **Customer Needs** | How can we help you today? (what does the customer want)? |
| | Information<br>• Toilets<br>• Washing Stations<br>• Other _____ |
| | Purchase supplies |
| | To place an order<br>• Toilets<br>• Washing Stations<br>• Other _____ |
| | See Product Options |
| | Repair of existing WASH product |
| | Other Need_____ |

| Domain of Enquiry | Assessment Questions |
|---|---|
| Information Needs | What information do you need about WASH products? |
| | • Price |
| | • Product options |
| | • Payment options |
| | • Benefits of toilets and washing stations |
| | • Improving hygiene behaviours |
| | • Risks of open defecation |
| | • When and how to use |
| | • Other _____ |
| | How do you prefer to receive information about WASH products and services? |
| | Where do you usually get information about WASH products such as toilets and washing stations? |
| | Who do you usually discuss WASH needs with? _____ |
| Motivations | What information would prompt you the most to get a toilet and/or a washing station? |
| | • Affordable price |
| | • Quality of product |
| | • Payment options |
| | • Ease of use |
| | • Easy to clean and maintain |
| | • Better Hygiene |
| | • Quick construction/installation |
| | • Other_____ |

| Domain of Enquiry | Assessment Questions |
|---|---|
| Access to toilet washing station | Do you have access to a toilet for personal use? |
| | Do you have access to a washing station for personal use? |
| Referrals | How did you hear about us? (GET SPECIFICS (who, how, names) – radio, television, WhatsApp, word of mouth, flyer, poster, promotion visit, community meeting, etc. |
| | If referred, what is the relationship of the referee to you? Spouse/Partner, relative, friend, community member, health worker, sanitation officer, salesperson, etc. |
| Satisfaction | Have you purchased products from this company before? |
| | What product did you purchase? |
| | Are you satisfied with your purchase? |
| | If no, what is the concern? What can we do to make it better? |
| Customer Case Referred for Action to: | (Name) (Date) |

# TOOL TEMPLATE 5: CUSTOMER ENGAGEMENT

**Download Tool Template 5 here**

| User Group<br>Groups targeted for relationship building | Information Needs<br>WASH topics of interest to the target group | Communication Preferences<br>How the group prefers to receive information? | Engagement Activities<br>What activity you will do to engage the group |
|---|---|---|---|
| **Government sector** | | | |
| | | | |
| **Political sector** | | | |
| | | | |
| **Commercial sector** | | | |
| | | | |
| **Non-governmental sector** | | | |
| | | | |
| **Other civil society target audiences** | | | |
| | | | |
| User Group<br>Groups targeted for relationship building | Information Needs<br>WASH topics of interest to the target group | Communication Preferences<br>How the group prefers to receive information? | Engagement Activities<br>What activity you will do to engage the group |
| **International donors** | | | |
| | | | |
| **Influential individuals** | | | |
| | | | |
| **Lay Public, Community members** | | | |
| | | | |
| **Other** | | | |
| | | | |

## TOOL TEMPLATE 6: KPI WORKSHEET TEMPLATE

**Download Tool Template 6 here**

| KPIs | Definition | Calculation | Disaggregation | Data Source | Baseline | Target | Frequency of Data Collection | When to Analyse | Notes |
|------|-----------|-------------|----------------|-------------|----------|--------|------------------------------|-----------------|-------|
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
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|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

# TOOL TEMPLATE 7: CRM MASTER FILE WITH SOME OF THE CATEGORIES WITH SAMPLE CODES

**Download Tool Template 7 here**

| Client ID | Contact and Demographic Information | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|
| **Client ID** | **Data Entry** | | | **Project Year** | **Primary Contact (Household Head)** | | | **Customer Status** | **Demographic Info** | |
| | **Date** | **By (Staff Name)** | **Type of Contact** | | **Household Head** | **Telephone** | **Address** | | **Gender** | **Age Range** |
| | mm/dd/yyyy | Last, First Middle | In-Person: Household | 2018 | Last, First Middle | | | Fully paid | Female | 18-29 |
| | | | In-Person: Office | 2019 | | | | Payment started | Male | 30-39 |
| | | | Phone Call | 2020 | | | | Contract signed (no payment) | Unknown | 40-49 |
| | | | | 2021 | | | | Contract in negotiation | | 50-59 |
| | | | | 2022 | | | | Inquiry made (prospect) | | 60 and older |
| | | | | 2033 | | | | | | Unknown |

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## TOOL TEMPLATE 8: PAYMENT AND REFERRAL STATUS WITH SAMPLE CODES (THAT CAN BE MERGED OR LINKED TO THE CRM MASTER FILE BY CLIENT ID)

**Download Tool Template 8 here**

| Client ID | Payment and Referral Status | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| **Auto #** | **Payment Status** | | | | **Status** | **Referral Status** | | **Relationship** | **By Client ID** |
| | **Total Amount** | **Amount Paid** | **Balance** | **As of** | | **Referred** | **By Existing Customer** | | |
| | Numeric | Numeric | Auto fill (total – paid) | Month, Year | Paid on time | Yes | Yes | Spouse/Partner | |
| | | | | | Delayed | No | No | Child | |
| | | | | | Paused | | | Relative (family member other than spouse/partner or children) | |
| | | | | | Refused | | | Friend | |
| | | | | | | | | Neighbour/ community member | |
| | | | | | | | | Business sponsor/ colleague | |
| | | | | | | | | Landlord/landlady | |
| | | | | | | | | Tenant | |
| | | | | | | | | Religious/traditional/ community leader | |
| | | | | | | | | Other | |

# OTHER RESOURCES

For information on social and behaviour change:

**sbccimplementationkits.org/lessons/ step-4-strategic-approaches**

**healthcommcapacity.org/ hc3resources/what-is-sbcc**

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