

## Tool 3.3: Network with rural on-ground channel partners and state-level initiatives

Collaborating with on-ground channel partners can enhance your reach to potential rural target communities, especially women. You can also partner with state-level schemes or programmes aiming to improve women's economic activities to tap into women-dominated value chains and self-help groups (SHGs) while facilitating access to loans for your women customers.

### Tool objectives

- To enhance outreach to potential women users in rural areas, especially women-dominated groups such as self-help groups (SHGs), farmer-producer organisations (FPOs), and cooperatives.
- To increase awareness of your technology and realise an increase in sales by leveraging the existing user base of on-ground partners.

### Action plan

#### Step 1: Identification and collaboration with ground partners

- ☐ Approach channel partners/State Rural Livelihood Missions (SRLMs) and state-level departments to promote your technology considering the following parameters:
  - ☐ The goals and vision of the partner organisation must align with your organisation.
  - ☐ Ensure partners have a local presence, community rapport, and a broad user base.
  - ☐ Experience in marketing livelihood technologies to local communities.
- ☐ Before finalising the agreement, set per-sale incentive percentages and terms and conditions, such as responsibility for technology training, technology installation, delivery of the technology, repair and maintenance, and others.

#### Step 2: Conduct training for the partners

Train a cohort of individuals (training of trainers (ToT)) within the partner organisation to serve as trainers for their field executive/personnel.

- ☐ **Technology-specific training:**
  - ☐ Conduct three to four hours of virtual training over two days to explain the details of your technology, its impact on livelihood, usage and application, and cost.
  - ☐ Conduct a demo sales activity (virtually by taking participants to breakout rooms) to assess participants' understanding of the technology and its application.
- ☐ Training on pitching to women users covering aspects which require gender-sensitive approaches
  - ☐ Detailed information about the technology, specifications, and impacts, connecting it with their needs and preferences.
  - ☐ Financing options include sharing details of relevant schemes and financing options by local banks and institutions.



- ☐ Ensure that sales materials, marketing campaigns, and technology demos feature diverse representations of women users. Share case stories of existing successful women users (if possible).
- ☐ Build their confidence by highlighting how the technology can enhance their productivity, income, drudgery, and others.
- ☐ Training to collect know-your-customer (KYC) details of potential customers for follow-up.

*Note: Refer to [‘Annexure 1’](#) for sample KYC form format.*

- ☐ Provide partners with your marketing collaterals and brochures in vernacular languages, supporting them in increasing outreach (refer to [‘Tool 4.2: Create gender-inclusive marketing collaterals’](#) for further details on creating gender-inclusive marketing collaterals).

### Step 3: Performance monitoring and course correction

Track process and success indicators to evaluate your interventions and business strategies.

- ☐ Conduct fortnightly meetings with the partners to understand gaps, challenges, and progress.
- ☐ Design a Management Information System (MIS) Google Sheets to track the progress of targets set in real-time (fortnightly/monthly) and Google Sheets/Google Forms to collect KYC data from potential customers.

*Note: Refer to [‘Annexure 2’](#) for sample MIS sheet.*

- ☐ Analyse the data and bring course correction measures for each identified challenge.

#### Pro-tips

1. SRLMs can leverage their existing funds for SHGs, such as revolving funds and the Community Investment Support Fund (CIF). For channel partners, efforts would be required to unlock financing for users to purchase technologies (refer to [‘Tool 5.1: Enable affordable and accessible financing options’](#)).

2. It is essential to obtain consent from the potential customer before collecting KYC data and to mention that the data collected is only for internal reference purposes.

*Note: Refer to [‘Annexure 3’](#) for the sample consent form.*

### Indicative: Required resources and cost and time implications

**Resources:** On-ground partner, a dedicated resource to manage the partnership and conduct ToT, training materials (soft and hard copies), training set-up (laptop, internet connection for virtual training), technology-related collaterals and brochures, campaigns/events.

Indicative cost heads*	Cost implications Low: USD 0–2,500 Medium: USD 2,000–5,000 High: USD>5,000	Time implications Low: 1–3 hours/week Medium: 4–5 hours/week High: >5 hours/week	Frequency of expenses
Virtual training	Low	High	Per training
Dedicated HR cost	Medium	Low	Annually
Trainer cost (salary)	Medium	Medium	Monthly
Training materials	Low	Low	One-time
Collaterals/Manuals/Brochures	Low	Low	As required
Awareness generation	Low	Medium	Recurring

*\*Note: This calculation provides an overview of the primary cost categories associated with the implementation of this tool. Minor expenses may also be incurred.*

*Source: Authors’ analysis*

## Potential indicators to measure success

- Number of leads generated and sales via on-ground partners.
- Increase in the organisation's monthly revenue.
- Increase (quantitative) in the women customer base among the SHGs, women-led FPOs, or cooperatives after partnering with on-ground partners.

## Success story

At [Powering Livelihoods](#) programme, we initiated partnerships with on-ground partners to increase the outreach of cleantech to rural women communities. These partners were 1Bridge, Dharmalife, and ESSMART, alongside collaboration with State Rural Livelihood Missions (SRLMs) from Bihar and Uttar Pradesh. On-ground partners act as distribution channel partners to enterprises, helping generate product awareness by conducting trade activation events, demonstrating technologies' applications, and generating leads. Through the partnership with SRLMs, over 100 cleantech sales have taken place, all to women users, including the distribution of demo units showcasing innovative cleantech like solar dryers, solar silk reeling machines and solar refrigerators.



Image: Powering Livelihoods

*Prerna Ojas, UPSRLM, conducting an event to generate awareness about DRE technologies for rural SHG women in Uttar Pradesh.*

## Annexure 1: Sample know-your-customer (KYC) metrics

<b>Customer-related information</b>	
<b>Name of the customer</b>	
<b>Residential address</b>	
<b>Contact details of the customer</b>	
<b>Gender</b>	
<b>Source of livelihood</b>	
<b>Purpose of technology purchase</b>	
<b>Amount willing to pay</b>	
<b>Financing requirement</b>	Yes/No
<b>Existing loan</b>	Yes/No
<b>If yes, details of the existing loan</b>	Name of the bank: Loan amount: Total amount repaid:

*Note: Ask for permission before collecting the KYC data.*

## Annexure 2: Sample MIS sheet

Particulars		Month XX	Month XX
<b>Total geographies covered</b>	State: District: Blocks: Villages:		
<b>Number of marketing activities conducted by the rural distributor (e.g., promotional events, advertising campaigns)</b>	Number of events conducted:		
	Event: Location: Date: Total footfall: Leads generated: Sales: Link to KYC data		
<b>Total leads generated</b>	Male: Female: Others:		
<b>Total sales</b>	Male: Female: Others:		
<b>Total revenue generated from sales</b>			
<b>Total technology inventory</b>			

<b>Number of training sessions conducted for field executives/ sales agents</b>			
<b>Incentives or commissions paid</b>			
<b>Remarks</b>			

### **Annexure 3: Sample consent form from potential users (in vernacular language)**

[Organisation's Letterhead]

[Date]

[User's Name]

[User's Address]

Dear [User's Name],

Subject: Consent for Collection of Know Your Customer (KYC) Data

As part of our commitment to providing secure and compliant services, we require certain personal information from our existing/potential users to verify their identities and fulfil regulatory requirements. This process is known as Know Your Customer (KYC) verification.

We kindly request your consent to collect and process the KYC data as follows:

1. Name of the customer:
2. Residential address:
3. Contact details of the customer:
4. Gender:
5. Source of livelihood:
6. Purpose of technology purchase:
7. Amount willing to pay:
8. Financing requirement:
9. Existing loan:
10. If yes, details of the existing loan:

The collected data will only be used to verify your identity and for internal reference. Your information will be securely stored and not shared with third parties. By providing your consent, you acknowledge that you have read and understood our privacy policy and agree to collect your KYC data as described above.

Thank you for your cooperation.

Sincerely,

Name

Position

Contact detail