Conducting a Gender Analysis

How it can help your business and how to do it
Conducting a Gender Analysis

Summary

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

The key steps of a gender analysis are:

- SET OBJECTIVES
- DEVELOP A WORK PLAN
- CONDUCT ANALYSIS
- DEVELOP RECOMMENDATIONS
- IMPLEMENT

For further guidance, contact the Women IN Business at:

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This guide is directed to businesses that are looking to promote gender equality, and is based on TechnoServe and WIN experience with its partners.
Why should your business conduct a gender analysis?

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

**Employees**
- Improve retention rate of employees
- Increase innovation by employees

**Customers**
- Expand and/or diversify its customer base
- Increase sales
- Improve customer loyalty

**Partners**
- Unlock funding with adoption of gender equality criteria
- Reach more suppliers and business partners

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How it can help your business and how to do it

Examples of gender analysis benefits

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

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

- Luke Hodgkinson, Managing Director of ENGIE Energy Access Mozambique

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

- Luke Hodgkinson, Managing Director of ENGIE Energy Access Mozambique

**What can businesses learn through gender analysis?**

**Women and men have different roles at home and work, shaped by society**

**Information channels**

**Education levels, skills & confidence**

**Control over income and other benefits**

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

**In the workforce, women and men have different opportunities to apply for and be hired for certain jobs**

**Ways of hearing about employment or promotion opportunities**

**Ability or willingness to compete for higher paying jobs or promotions**

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

**As customers, women and men have different needs and preferences for products and services to help them do their work**

**Ways of hearing about products and services**

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

**Ability to afford products / services or make purchasing decisions**
Case study

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

Case Study: ENGIE Energy Access

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

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

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

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

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

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

How it can help your business and how to do it

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

1. Set objectives
   Define the objectives of the gender analysis
   Break down objectives into key questions for the gender analysis.

2. Develop a work plan
   Assess internal capacity to conduct a gender analysis
   Identify sources of information/ availability
   Finalize workplan

3. Conduct analysis
   Design data collection activities
   Roll out surveys/ interviews (as needed)
   Analyse data/ information

4. Develop recommendations
   Synthesize findings and prioritize issues
   Develop recommendations

5. Implement
   Operationalize
   Create a gender action plan.

Define the objectives of the gender analysis

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

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

Common objectives could include:

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

Top Tips!

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

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

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

Outline questions that you want to answer in the research.
Set objectives using a decision tree - What do we need to learn more about to improve our business?

### How to attract new talent to drive growth and innovation?
- Do we use approaches to encourage women to apply? And men to apply?
  - **YES**
  - **NO**

- Do we collect and review data from women and men staff to inform our approach? Including data on:
  - Information channels women use to learn about job opportunities and the channels men use
    - # of women and # of men who apply for positions
  - # of women and # of men who were hired for positions
  - # of women and # of men promoted within the company

- **Yes, all data**
- **None or only some data**

Learn how to build more gender-balanced teams to drive growth and innovation

### How to retain talent?
- Do we use approaches to help women succeed in our company? And men?
  - **YES**
  - **NO**

- Do we collect and review data from women and men staff to inform this approach? Including data on:
  - Women’s skill development needs
  - Men’s skill development needs
  - What benefits incentivize women and men to stay with the company (e.g., pay, leave)

- **Yes, all data**
- **None or only some data**

Learn how to improve retention rate of employees, especially women

### How to expand our loyal customer base?
- Do we use approaches to attract and retain women as customers? And men customers?
  - **YES**
  - **NO**

- Do we collect and review data about women and men customers to inform this approach? Including data on:
  - Women’s and men’s product / service needs and preferences
  - Information channels women use and men use to learn about products / services
  - Women’s and men’s abilities to easily use different products / services
  - Affordability of products for women and men

- **Yes, all data**
- **None or only some data**

Learn how to diversify customer base, especially women customers

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**Case Study: ENGIE Energy Access Gender Analysis**

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

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

WIN helped ENGIE to identify challenges women may face as ENGIE’s sales agents and customers
Conducting a Gender Analysis

How it can help your business and how to do it

Step 2
Develop a Work Plan

Key components of a work plan - checklist

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

Assess internal capacity to conduct a gender analysis

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

- Executive Management team (CEO or COO)
- Director of Human resources
- Operations and/or Commercial team leads (customer facing teams in general)

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

Top Tips!

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

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

Identify sources of information/ availability

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

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

How it can help your business and how to do it

Example of a work plan used by ENGIE:

<table>
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<tr>
<th>Activity</th>
<th>Responsible</th>
<th>Apr</th>
<th>May</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kick-off and define team responsibilities</td>
<td>Management Teams</td>
<td>12</td>
<td>19</td>
</tr>
<tr>
<td>Define gender analysis frameworks</td>
<td>Management Teams</td>
<td>26</td>
<td>03</td>
</tr>
<tr>
<td>Conduct primary research</td>
<td>Operations</td>
<td>03</td>
<td>10</td>
</tr>
<tr>
<td>Analyse data/information</td>
<td>Operations</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>Develop 2-3 interventions for recruitment/</td>
<td>Operations and</td>
<td></td>
<td></td>
</tr>
<tr>
<td>marketing</td>
<td>Commercial</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Final report in PPT</td>
<td>Operations</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Step 3
Conduct Analysis

Design data collection activities

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

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

Top Tips!

Things to consider when developing your interview questionnaire/guide:

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

The ENGIE case study provides examples of

Who to consult

Learning objective

Research techniques

Case Study: ENGIE Energy Access

Gender Analysis

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

Also the data collection of the primary research counted on the support of the call center, part of Customer Service team.
## Case Study: ENGIE Energy Access
### Gender Analysis

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

<table>
<thead>
<tr>
<th>Stakeholders</th>
<th>Research activities</th>
<th>Research focus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales team</td>
<td>9 interviews with sales team managers and agents</td>
<td>Understand how a team member’s gender may affect his/her experience</td>
</tr>
<tr>
<td></td>
<td>Survey of 30 GES</td>
<td>Identify opportunities to improve recruitment</td>
</tr>
<tr>
<td>Customer experience team</td>
<td>10 interviews with service and call center staff</td>
<td>Gather additional perspective about sales team and customers</td>
</tr>
<tr>
<td></td>
<td>GES</td>
<td>Explore perceptions of gender differences in sales team and customers</td>
</tr>
<tr>
<td>Customers</td>
<td>Survey of 33 customers</td>
<td>Gather information on customer experiences and challenges, disaggregated by gender</td>
</tr>
<tr>
<td>Potential customers &amp; employees</td>
<td>5 interviews with female micro-retailers</td>
<td>Understand how household decision-making dynamics may affect a woman’s decision to buy a product or work as a GES</td>
</tr>
<tr>
<td></td>
<td>4 interviews with cassava farmers</td>
<td></td>
</tr>
</tbody>
</table>

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

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

<table>
<thead>
<tr>
<th>Topics</th>
<th>Questions</th>
</tr>
</thead>
</table>
| Roles at home and work, shaped by society   | • How does the organization recruit women staff?  
• What beliefs and norms of women and men agents affect their ability to succeed?  
• How can the commercial team reach more women customers? Where can they find women customers? What methods will be most effective to identify these?  
• Do women and men in the sales team face any time and mobility constraints? (e.g. cultural norms requiring them to be at home for certain periods of time, or safety concerns) |
| Information channels                        | • Do women or men in the sales teams have different information on product/services characteristics? In what ways?  
• What additional information would increase their effectiveness? |
| Education levels, skills & confidence       | • What is the current level of satisfaction and confidence of women and men in the sales teams (both managers and agents)? |
| Control over income and other benefits      | • How do sales managers make decisions about recruitment? What are the challenges?  
• Do women or men sales managers make decisions about recruitment differently?  
• How do men and women customers make decisions to purchase? Do they consult anyone else in the process? |
Conducting a Gender Analysis

How it can help your business and how to do it

Roll out survey/ interviews

- Obtain responses directly from the respondent
- Try for a mixed-gender research team where team members are trained in gender equality
- Maintain confidentiality
- Usually there are consent forms and/or verbal consent to go forward with the interview
- Respondents should always be given an option to refuse to answer

Top Tip!

Be aware of bias. There are different types of bias that can be avoided when rolling out surveys/interviews, so be mindful. Here are some examples:
- Be clear about the process of the interview/survey and its objectives.
- Know your audience. Avoid using terms that can trigger people to be unresponsive or untruthful. For example: development jargon that can influence the answers (e.g., women’s empowerment).

Analyze data/information

- Description of men’s and women’s roles
- Identification of factors that shape men’s and women’s opportunities
- Explanation or description of gender-based constraints
- Identification of areas of action to ensure gender-equal participation and benefits from program activities

Top Tip!

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

Synthesize findings and prioritize issues

Step 4
Develop Recommendations

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

- Key Challenges/Opportunities
- Root causes

Identifying challenges and opportunities:
- What are the most important hypotheses that emerge from your analysis?

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

Challenge | Key Issues | Evidence
--- | --- | ---
Recruitment |  |  |
Retention |  |  |
Sales |  |  |
Overall |  |  |

Top Tip!

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

Example:

- There are twice as many men as women working as sales agents.
- Recruitment and outreach process favors men
- Managers use inconsistent selection criteria and shows bias towards men
- Women may be hesitant to apply due to social norms.
Define initiatives
- Define possible initiatives based on their impact and ease to implement.
- Find criteria most relevant to the business. It could be a criterion: ‘relevance to a key product’ or ‘cost’.

<table>
<thead>
<tr>
<th>Challenge</th>
<th>Initiatives</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruitment</td>
<td>Selection Process</td>
<td>Provide enhanced guidance to managers to conduct interviews and make selection decisions in a fair and objective manner</td>
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</table>

**Potential Outcomes**
- Impact
- Ease to implement

**Potential Outcomes**

**Case Study: ENGIE Energy Access**

**Gender Analysis**

**Key findings**
- Recruitment practices were likely overlooking high-quality female sales agents
- Some staff believed female sales agents are less capable, which is not grounded in evidence and may contribute to higher attrition
- Sales agents perceive men as “easier” customers because they have more financial power and straightforward decision-making dynamics
- Both men and women use products in the majority of customer households, though women report more technical challenges

**Areas of opportunity**
- Standardize recruitment to include female-friendly outreach and fair selection criteria
- Support sales managers with:
  - Gender-sensitivity training to identify and address bias
  - Guidance on effective support of female sales agents
- Train sales agents to think critically about customer needs and decision-making dynamics
- Support further data collection on women users to drive customer impact
Operationalize the recommendations. This could involve developing a gender action plan

Operationalize:
- Review which initiatives you need to address based on key objectives;
- Prioritize initiatives:
  - Which of these practices are most feasible to address;
  - Which practices are important but will require more time or further assessment.

Top Tip!
Define a set of indicators to monitor the results of the initiatives using sex-disaggregated data.
Top management should set a regular meeting (e.g. monthly or bi-monthly) with the Gender Task Force to help monitor actions and progress to support gender equality.

Create a gender action plan:

1. **Focus**
   on leveraging existing strengths and capacities to achieve results.

2. **Co-develop**
   a list of actions to improve the adoption of each initiative. For example, if you are prioritizing improving your recruitment materials so they include women. You would list each step required to update those materials: receive input into design, design, test.

3. **List**
   roles and responsibilities, timeframe, and other notes.

---

**Example of a operational plan used by ENGIE:**

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<td>Impact survey</td>
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<tr>
<td>Field team expansion</td>
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**Case Study: ENGIE Energy Access Gender Analysis**

**Conducting a Gender Analysis**

**How it can help your business and how to do it**

**Step 5 Implement**

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

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

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

Elsa Comé, ENGIE Energy Access customer experience team