

Facilitator guide

MODULE 5: ENGAGING KEY ACTORS

Purpose: Participants know how to engage key actors in the PMSD process, by initiating relationships, identifying ‘hooks’ and communicating effectively.

Learning objectives:

On completing this module participants should be able to:

- Understand what we mean by the term ‘hook’
- Learn how to build relationships with market actors
- Use effective listening and questioning of key actors to uncover their interests and motivations
- Use event organisation and invitations to engage key actors

Key messages to convey through this module:

- **Establish relationships with the actors:** this is going to make the most difference to whether they are receptive to your communication
- **Almost anything can be a hook or a detractor:** so think carefully about what is communicated, how and by whom

Materials:

- ❖ [5.1 Engaging Key Actors – slides](#)
- ❖ [5.2 Trust Equation elements](#)
- ❖ [5.2a Trust Equation Handout](#)
- ❖ [5.3a Know your actors template with questions](#)
- ❖ [5.3b Know your actors role card](#)
- ❖ [5.4 Prepare your invitation info sheet](#)
- ❖ Flipchart and markers
- ❖ Blue tack
- ❖ Blank A4 sheets of paper

Session title	Time
Introduction	20 mins
Building relationships – the trust equation	40 mins
Know your actors – listening to uncover ‘hooks’	70 mins
Preparing an invitation	30 mins
Total	2 hrs 40 mins

Session title: Introduction
Time: 20 mins
Materials: ❖ Slides 1-3
Objective: <ul style="list-style-type: none"> ➤ describe what we mean by a ‘hook’ ➤ define key terms relevant to this module
<p>Process:</p> <p><i>Ask:</i></p> <ul style="list-style-type: none"> • Why did you come to this training session today? <i>[go round the room and hear from each person, write key words on the flipchart, and encourage them to be really specific about what is in it for <u>them</u>]</i> • The reasons you just gave such as <i>[paraphrase or repeat back what they have said]</i>, are the ‘hooks’ that ensured that you chose to be here rather than prioritising something else today. • How did the invitation communicate that hook to you? <i>[you may need to probe - for example who sent the invitation, what was the style, content, agenda etc of the invitation]</i> • How do you think this discussion relates to the topic ‘Engaging Key Actors’? • So this is what we are here to talk about in this module <ol style="list-style-type: none"> 1. How do you understand the hooks or reasons for key market actors to engage in the PMSD process 2. Finding effective ways to communicate them <p><i>Present:</i></p> <ul style="list-style-type: none"> • Let’s review some of the key elements of this module and see what you have already learned which will be relevant • <i>[slide 2] [Discuss these definitions using the notes as a guide]</i> • Now let’s go through the agenda for this module... <i>[slide 3]</i> <p>Notes:</p> <ul style="list-style-type: none"> • The reasons to participate in the training session could be very diverse, and may include things like ‘I am in the middle of a market development project and am looking for practical tips’ / ‘My manager suggested I attend’ / ‘I want to progress my career’ / ‘it sounded like fun!’ • This discussion will only work if there has been some element of free will involved in them attending the training! Otherwise, you can use the following alternative discussion question... • Alternative discussion: ‘Why did you attend the last party/social event/conference that you went to?’ ‘How did the organiser communicate that hook to you?’

Slide notes:

Market Actor - Note that the word market actor can mean an individual, an organisation, a network, a group or a company, who plays a role within a particular market system. A number of different individuals work within these organisations, and you must pay special attention to identify specific individuals you will want to reach out to for strategic reasons. So remember: an actor means a market actor, sometimes an organisation of some kind; and an individual means a particular person within that organisation. Note however that, in some situations, a single individual can also be a market actor (e.g. an individual producer or trader).

Key Actor - Those which are essential to engage in the process of participatory market systems development if it is to achieve its objectives.

Key individual – It is important to think about who to target within the market actors (e.g. institutions or organisations) you are trying to bring to the table. You need to aim for someone who is: (i) likely to listen, (ii) has some power to mobilise their organisation. It is also desirable to hook people who have a tendency to make forward thinking decisions in the organisation.

Engage – In the PMSD process, engagement is about much more than just consultation or informing people of what we're doing. It is the market actors who take the lead. Therefore engagement means that they are fully brought into the process, they see what's in it for them and they take forward the actions they have committed to. Specifically, it means taking part in the Participatory Market Mapping Workshops, defining an action plan, possibly taking part in an Interest Forum and taking forward actions independently of the NGO's involvement.

Session title: Building relationships – the trust equation
Time: 40 mins
<p>Materials:</p> <ul style="list-style-type: none"> ❖ 5.2 Trust Equation elements (1 copy, printed or copied on to post-its) ❖ 5.2a Trust Equation Handout (1 per participant, printed on small cards if possible) ❖ Slide 4
<p>Objective:</p> <ul style="list-style-type: none"> ➤ Participants can describe the trust equation and how it can be used to build relationships with and between market actors
<p>Process:</p> <p><i>Present - 5 minutes:</i></p> <ul style="list-style-type: none"> • Building relationships with and between market actors is essential to a successful PMSD process. Trust is the foundation of a good relationship. • If market actors don't trust you, they won't engage with the process. • Therefore, we will spend some time looking at how to build trust, using the 'trust equation'. <p><i>Activity:</i></p> <p>Step 1 - 20 mins</p> <ul style="list-style-type: none"> • <i>[Split the participants into 4 groups]</i> • <i>[Give groups a mixed up set of words and symbols that they must piece together to form the equation]</i> • You will have 10 minutes to put the equation together in the way that you think makes sense • <i>[When groups have finished, facilitate a discussion around any differences between what different groups have done, or any disagreements within groups]</i> • <i>[Show the correct answer on slide 4]</i> <p>Step 2 - 10 mins</p> <ul style="list-style-type: none"> • Define 'credibility' – what do you think it means? • What things can you do to increase your credibility with market actors? • What things might you do that would decrease your credibility? • <i>[Repeat questions for each component of the equation. See Slide Notes below for definitions if they get stuck]</i> • How could this same equation be applied to building trust between actors as well as between the facilitator and the actors? <p>Give participants the <i>Trust Equation Handout</i></p>
<p>Notes:</p> <ul style="list-style-type: none"> • Be aware of any participants who seem to be struggling with the mathematics

of the equation – point out that if you increase anything *above* the line it will *increase* the trust levels, while if you increase anything *below* the line it will *decrease* the trust levels

- People may struggle with some of the **terminology** – this is fine as it encourages debate and discussion. However, if you see that the participants are getting stuck you may wish to explain that:
 - ‘*Self-orientation*’ is defined as being ‘overly concerned with one’s own desires, needs, or interests, above those of others’
 - ‘*Intimacy*’ should really say ‘appropriate intimacy’ as it refers to culturally suitable ways to build rapport through sharing personal as well as business information with each other. For example, in Kenya it is appropriate to ask how the other person is, how their family is and discuss the weather before getting on to the point of your conversation. However, it is worth highlighting that if intimacy is culturally inappropriate or ‘too much too soon’, this can backfire.

Examples of things people could highlight under the four categories, to increase or decrease that quality, and the market actors’ perception of it:

Credibility

- ✓ Talking about track record of previous projects and evidence of the positive impact they have had on businesses, but also talking about own mistakes and lessons learned; sharing challenges faced and how the person overcame them; talking from own experience; participating in business events; honesty and realism
- ✗ Only talking about beneficiaries; avoiding speaking to business people; avoiding evidence or real-life examples; having airy fairy or unsubstantiated ideas

Reliability

- ✓ Managing expectations of what the project will do; clear agendas for meetings; following up on promises; being on time (culturally specific)
- ✗ Unfocused meetings; no apparent movement or progress

Intimacy

- ✓ Making an emotional connection; understanding how they feel about their business; being willing to offer thoughts and advice about their business outside of the remit of the project; informal meetings e.g. over lunch (as appropriate)
- ✗ Only ever meeting formally and to discuss “the technical stuff”; avoiding difficult questions or difficult messages of a personal nature

Self-orientation

- ✓ [ie. contributes to low self-orientation] listening and asking questions; genuinely caring about the actors’ success
- ✗ [ie. contributes to high self-orientation] being distracted; jumping in too quickly with solutions that disregard others’ interests

Slide Notes:

The trusted adviser – a well-respected book which helps professionals to build trust with clients but is also applicable in this situation as market facilitators want to gain the trust of market actors.

Credibility = your expertise as well as the way you present yourself (words)

Reliability = the link between what you say and what you do, consistency (actions)

Intimacy = developing a personal relationship, understanding their values (emotions)

Self-orientation = degree to which you are self-focused rather than focused on them, (motives) – high self-orientation dramatically decreases trust

<p>Session title: Know your actors – listening to uncover ‘hooks’</p>
<p>Time: 70 mins</p>
<p>Materials:</p> <ul style="list-style-type: none"> ❖ 5.3a Know your actors template with questions – two copies ❖ 5.3b Know your actors role card – one copy ❖ Slide 5
<p>Objective:</p> <ul style="list-style-type: none"> ➤ Using listening and questions to uncover interests and motivations of key actors
<p>Process:</p> <p><i>Present – 5 mins:</i></p> <p>There are a number of ways to uncover important information about key market actors; one of the best ways to understand their <u>interests</u> and <u>motivations</u> is by listening and asking questions. This process also builds trust. The following slide raises some important questions to ask on how to get to know our actors.</p> <p><i>[slide 5]</i></p> <p><i>Activity:</i></p> <p>We’re going to do a short role-play to practice asking questions to uncover some information in relation to questions 1 and 2 on the slide. The scenario will involve the first contact the market facilitators will make to a particular market actor. It is the objective of the market facilitators to build trust and find out enough information in order to hook the actors into the next stage of the process..</p> <p>Step 1 – 15 mins</p> <ul style="list-style-type: none"> • You will all be looking at the Cattle market system, but you will continue to work in the same 4 groups. Two of the groups will play market facilitators while the other two groups will play market actors: <ol style="list-style-type: none"> 1. Market actors – a chicken feed manufacturer interested in moving into cattle feed 2. Market facilitators – who will contact the chicken feed manufacturer 3. Market actors – the Department of Livestock 4. Market facilitators – who will contact the Department of Livestock • <i>[give the ‘know your actors template’ to the market facilitators (groups 2 and 4), and the correct ‘know your actors role card’ to the corresponding market actors (groups 1 and 3)]</i> • Groups will have 10 minutes to prepare their roles/approach • The Market Actors (groups 1 and 3) should consider their role card and may expand or add to the information therein • Market Facilitators (groups 2 and 4) should consider how to approach the

conversation in order to uncover useful information about the market actor while building trust. Considering possible answers to the template may help to prepare this approach

Step 2 – 30 mins

- *[Get participants to act out the role plays – start with the feed manufacturer i.e. groups 1 and 2]*
- *[Have the groups sit facing away from each other so they don't have the advantage of reading body language.]* (Remember that this is a phone conversation)
- Market facilitators, you will 'call' the market actor and role-play your telephone conversation. The rest of you will observe this conversation.
- *["pause" them after a couple of minutes]*
 - To the facilitators – How is it going? Are you building trust?
 - To the market actors – how is it going on your side? Do you trust them? Are you engaged?
 - To the observers – any observations or tips you would like to give the facilitators?
- Continue the conversation
- *[after a few more minutes "pause" them again]*
 - To the facilitators - How is it going? How much information have you uncovered?
 - To the market actors - How does it feel to you? What is working well and less well for you?
 - To the observers - What do you think the facilitator should say or do next? Why?
- *[Continue pausing and reviewing the conversation whenever you see elements that could promote a good discussion in the group. Ensure you leave enough time in between for the conversation to flow naturally.]*
- *[as the conversation progresses, ask the facilitators:]*
 - Are you starting to get a picture of their interests and motivations? What kind of realistic hook are you now identifying?
 - If you think you have found a genuine reason for them to want to invest further time and resources in the process, test it out with them and see what response you get.

- Repeat with the Department of Livestock – groups 3 & 4

Debrief – 10 mins:

- *[get participants into 4 new groups to discuss the following questions in relation to both of the role plays]:*
 - To what extent was trust built?
 - How much new information was uncovered? Was it enough to 'hook' them into the process?

- What did the facilitators do that helped to build trust and uncover information?
- What did the facilitators do that detracted from their ability to build trust and uncover information?

Plenary – 10 mins

- Get the groups to share their answers to the last two questions

Notes:

- You will need to be very flexible when facilitating this exercise, and use your judgement to decide when to “pause” the role-play and when to let it continue. In principle: if you see interesting issues emerging, pause the groups; however do not exaggerate. Allow the groups to achieve some flow and momentum.
- Some of the things you may like to highlight in this exercise are:
 - Encourage participants to set a specific objective for the phone call, whether it is getting them to attend a participatory market mapping workshop or just to agree to a face to face meeting to discuss further
 - The number of times the facilitator mentions their own organisation/project vs the business of the market actor
 - Do they remember to introduce themselves?
 - Do they establish their credibility?
 - Do they use...
 - **active listening** – that is, leaving enough time for others to speak, listening and digesting what they say (rather than simply thinking about the next thing you are going to say)
 - **open questions** – questions which allow the actors to bring up the issues which are most important to them, for example ‘What are the major challenges your business faces?’ or ‘Where would you like your business to go in the next couple of years?’ rather than questions which have only a yes or no answer, such as ‘Is quality an issue for you?’
 - **probing questions** – which allow you to gain a deeper understanding of something they have said, for example ‘You have said you want to grow by 50% in the next 5 years; what will you need to do in order to achieve that?’
 - **summarising** and reflecting back to check understanding – for example ‘I understand from what you’ve said that there is a market for your product and even unmet demand, but you can’t get hold of enough of the raw materials you need to produce it. Is that correct?’

Slide Notes:

Interests (short-, medium- and long-term): Interests are the things that market actors want to achieve. In the case of a government department or a company this might be articulated as an objective. With other actors, interests are much more informal and are often never written down or vocalised.

It is important to think about interests within different time-frames: *short* – approx 3-6 months, *medium* – 6 months-2 years, *long* – 2-5 years. The reasons for this are two-fold: first, an actors' immediate, medium and long term interests will be very different, and they will place different levels of importance on these. Second, the PMSD approach tends to be better at tackling medium to long term interests, and so care needs to be taken regarding how to communicate these benefits.

Motivations (to engage and not to engage): Motivations are the push and pull factors that determine whether a market actor takes a particular strategy to achieve its interests. These are often informal or implicit. While you might be able to find the objectives of a company on their website and this will tell you about their interests, understanding their motivations will require more detective work and reflection.

For example, you may communicate to a private company that your activity is about building supply chain linkages. However if the company is really squeezed on staff and NGOs have a history of organising meetings that come to nothing, the company has strong motivations not to send anyone, or send someone who has no decision-making power, despite the alignment of your message with the company's objectives.

Influential actors (positive and negative): Other market actors who influence the actor that you are analysing. Most market actors are attracted to or detracted from events based on who they think will show up, who is convening the event, who is facilitating, who is chairing and so on. A powerful way of hooking key actors is to clearly signal that those who positively influence them to come will attend, or even better lead the event in some manner. At the same time it may be advisable to tone down reference to the market actors that detract them.

Key individuals (mobilisers and decision-makers): It's important to think about who to target within the institutions you are trying to bring to the table. You need to aim for someone who is (i) likely to listen, and (ii) who has some power to mobilise their organisation. It is also good to hook individuals who have a reputation of making forward thinking decisions in their organisations.

Session title: Preparing an invitation
Time: 30 mins
Materials: <ul style="list-style-type: none"> ❖ 5.4 Prepare your invitation info sheet – 2 copies ❖ Slides 6 and 7 ❖ blank sheets of paper
Objective: <ul style="list-style-type: none"> ➤ can translate a ‘hook’ into an effective event invitation
Process: <p><i>Present:</i></p> <p><i>[go through slides 6 and 7 to introduce the categories]</i></p> <p><i>Activity:</i></p> <p>Step 1 - 20 mins:</p> <ul style="list-style-type: none"> • You are a couple of steps further along the process and you have gathered some additional information about your market actor • <i>[Hand out one copy of the Prepare your invitation info sheet to each group, ensuring that the key actor is the same one they were working with previously]</i> • In the same groups you were in for the previous exercise, prepare an invitation letter for your market actor • In addition to the hook you will be communicating, remember to think about the following (although you do not have to include all the following info): <ul style="list-style-type: none"> - Who will the letter be <u>from</u>? - Which individual or individuals will it be addressed <u>to</u>? Do you need to send copies to any other individuals to keep them informed? - What is (are) the hook(s) or <u>message(s)</u> you are trying to convey? - What is the <u>title</u> of the event (if applicable)? - <u>Where</u> will the event be held? Who will be <u>hosting</u> it? - Who will be <u>chairing</u>, <u>facilitating</u> and <u>convening</u>? <p>Step 2 – 5 mins:</p> <ul style="list-style-type: none"> • Now pass your letter on to another group • Each group should now look at the letter they’ve been ‘sent’ and discuss it: <ul style="list-style-type: none"> - If you were the market actor that the letter is addressed to, what would make you <u>want</u> to attend and what would make you <u>not want</u> to attend? • Make a note of your key points regarding this <p><i>Plenary:</i></p> <ul style="list-style-type: none"> • Each group to present another group’s invitation along with their key feedback
Slide Notes: <p><i>[Slide 6]</i></p> <p>Make sure that you don’t fall at the last hurdle. When it is time to organise the</p>

first activity at which you want your key actors to attend, make sure that even the way that it is organised will attract them. Even the invitation can pull people in or put them off, so think about this too.

The message: What personal message in the invitation will convince the actor to come?

The contact method: How should the message be communicated? E.g. a formal letter, an informal email, a personal phone call?

The communicator: Who would be the best person to communicate your message to the key actor? Remember you can arrange to have a third party to be the communicator;

The recipient: Who within that organisation should you target in particular? These are the 'key individuals' you have targeted within an organisation, they are those who are forward thinking and those that have decision-making power. In this exercise that task has been done for you, but in practice it would require some investigation. See the Action point in section 2 of the step 5 guidelines.

[Slide 7]

The title of the event: What is a title that will attract everyone, or at least not put anyone off? For example using 'pro-poor' in the title may put some actors off.

The host and location: Where should the event be held to attract everyone, or at least not detract anyone? For example if it is held in the offices of one of the market chain actors it may seem as if the process is biased towards them.

The convener, facilitator and chair: If necessary you can appoint a number of positions for the event, each one attracting a different set of key actors;

The date and timing: Are there any issues to do with date or time which will influence whether key actors attend? For example holidays, harvest time etc.

**Top
Facilitation
Tip!**

Reviewing learning:

At the end of each module, or each day depending on how you are structuring the training, it is important to review participants' learning and address any questions or confusion, as well as get feedback for how the training was run. This will enable you to:

- Cement learning
- Understand what participants know and don't know
- Understand what participants are gaining from the training
- Address questions or confusion in the moment and/or...
- ...Revisit difficult topics in the next sessions
- Improve your facilitation skills
- Provide feedback to the PMSD Roadmap team about how the training can be improved

There are a number of ways of doing this ranging from the very simple to the more complex.

- The simplest review would consist of 2-3 questions answered verbally by each of the participants e.g. 'What made you happy?' 'What frustrated you?' 'What confused you?'
- There are many variations of these questions e.g. 'What was most valuable for you?' 'What did you learn?' 'What should we do differently in future?'
- A slightly more complex review could involve participants discussing these questions in small groups and reporting back their key points

If you are particularly keen to know what information they have absorbed, you can use a quiz...

- You could put the questions together yourself; some example questions are included below which you might use for a quiz on this module:
 1. Define a 'key actor'
 2. What are the five elements of the trust equation?
 3. Name two elements of an invitation which can be personalised to attract key actors to attend?
- An alternative (and usually more effective) technique is to have the participants prepare the questions themselves:
 - Get them into groups of 3-5 and have each group think-up as many questions as there are other groups and prepare an answer for each of the questions.
 - Have group 1 ask their questions first – one each to group 2, group 3 etc.

- Give each group a minute to answer their question – check back with the questioning group what their answer was and allocate a point for each correct answer – if there is a disagreement you may have to arbitrate
 - Then get group 2 to ask their questions to the other groups in turn
 - When all the groups are done, you should have a winner!
- NB – you might like to have a tie-break question prepared in case you do not have a clear winner