

CUSTOMER/SUPPLIER INSIGHT SURVEY: GUIDANCE NOTE

MSP PARTNERSHIP FACILITY

Background for Implementers:

Light touch, firm-led insight surveys can be a practical entry point for programs looking to nudge partners to adopt more tailored engagement strategies with smallholders or BOP customer segments. The experience of doing this can also strengthen a firm's own internal capacities and interest to intentionally learn.

The Feed the Future Market Systems and Partnerships Activity (MSP) requires partner firms to complete a brief customer or supplier insight survey as one of the first performance milestones in the pay-for-performance awards.

The purpose of the insight survey is to strengthen the impact and likelihood of the partnership's success, by supporting a firm to capture fresh insights about its supplier or customer base which can influence implementation. MSP has found that for many partners, this is the first time they have ever surveyed their suppliers around these types of questions, and so while the surveys are short and simple – they are still very valuable first steps.

This document contains:

- **A 4-page guidance document written for partners as the user.** It introduces the purpose of the insight surveys (e.g. these are not big demographic surveys, or an impact-focused survey the firm is doing for to help with donor reporting), some sample themes for supplier insight surveys and customer insight surveys, MSP's expectations of the firm, and at what points the firm can expect to engage with MSP, some simple considerations on the methodology, and a template for the short Key Findings and Implications report.

MSP 'walks through' this guidance with the partner in a conversation to ensure key messages are understood.
- **A sample supplier insight survey and methodology**
- **A sample slide / image MSP often uses to guide the initial brainstorm with the firm,** to support them in deciding what their priorities are with this survey and how insights can minimize risks and increase confidence of win-win outcomes. Can be printed and brought to an inperson discussion, plopped in an email where the agenda is shared, or shared-screen during a call.

Developed 2022. Shared with BEAM Feb 2023.

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I. Objective

MSP requires partner firms to complete a brief customer or supplier insight survey as one of the first performance milestones in the award. **The purpose of the insight survey is to strengthen the impact and likelihood of the partnership’s success**, by supporting a firm to capture fresh insights about its supplier or customer base which can influence implementation.

Supplier/customer insight surveys are intended to be **short, practical and light touch; led by partner firms**; and **build upon existing data collection efforts** (where possible). While the focus and design of each insight survey will vary from partner to partner, **they typically feature 5-10 questions** targeted at 5-10% of each partners’ supplier/customer base.

II. Overview

During the co-development and award negotiation, MSP will work with the partner to determine the general scope and timing of the survey, incorporated in the milestone. **The insight survey milestone in the award includes four components as the required means of verification.**

1. **Survey Questionnaire** (e.g. the specific questions and response options, approved by MSP prior to conducting the survey)
2. **Methodology** (e.g. a 1-2 page summary of what segments will be surveyed, how they will be selected, and more; approved by MSP prior to conducting the survey)
3. **Key Findings Report** (3-7 page summary submitted after conducting the survey, includes a section on how the survey findings may influence business decisions related to the partnership)
4. **Raw survey data** (e.g. an excel file with the individual responses)

At the start of implementation, incorporated into the workplan milestone, partners describe the timeline for completion of the insight survey, using this template:

Insight Survey Milestone Process Steps	Anticipated timeline
1. Initial insight survey orientation call with MSP team. <i>At this call we will align on expectations for the survey, brainstorm ideas for survey focus, and answer questions. This should happen before work on the questionnaire begins.</i>	<i>Date should be 3-4 months prior to when survey will be deployed.</i>
2. Submission of methodology write up and survey questionnaire – draft and final. <i>Allow 1 week for MSP to provide feedback on draft. MSP must approve the survey methodology and questionnaire before the survey happens. Use guidance in section IV.</i>	
3. Survey deployment. <i>Led by the partner, but MSP is available for light-touch support.</i>	

4. Submission of Key Findings report. Use the outline template in Section V. This completes the milestone.	Date should be no later than milestone due date in the award.
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To support use of these insights by the firm to enhance the partnership’s objective, the MSP team may follow up to discuss key findings at the semi-annual technical touchpoints or during monthly check-ins.

III. Survey Questionnaire: Illustrative Themes

Below are illustrative themes for supplier or customer insight surveys. Once themes are identified, the partner can develop simple survey questions. The insight survey typically features 5-10 questions. For example, if a firm wants to better understand what incentives are motivating suppliers to perform so they can invest in this aspect and market it in attracting new suppliers, the survey question might be:

As a new farmer just beginning with our company, what do you see will be the greatest benefit of working with us?

- Higher income
- New livelihood
- Technical training and support
- Equipment that improves your work
- Convenience and ease of selling product
- Other: _____

Then, the partner might look for differences in responses based on gender, geography, or farm size. *All survey data must be disaggregated and analysed by gender, at a minimum.*

Supplier Insight surveys: For partners that source directly from smallholder farmers, cooperatives, or other producer groups, a supplier insight survey may be the right instrument. Themes could include:

- *Household power dynamics* – Who makes household-level decisions about what to produce? What farming practices to adopt? Who to sell to? How to spend and allocate income?
- *Incentive* – What do producers value most from engagement with the partner firm or other buyers? What are points of frustration? What might increase supplier loyalty?
- *Supplier resource needs* – What inputs do suppliers need to meet production targets? What type of technical assistance or transportation/aggregation infrastructure? What are production risks?
- *Relationship health* – What do suppliers value most from their relationship with the firm? What can be improved? How can partners better engage women suppliers?

Customer Insight surveys: For partnerships focused on marketing to consumers or small and medium enterprise clients, a customer insight survey may be the right instrument. The objective of a customer insight survey should be to test assumptions around customer behaviors that represent risks or opportunities for the success of the pilot. Themes could include:

- *Customer segmentation* – What are the specific needs of different categories of customers? How does segmentation better enable the partner to deliver value to customers/meet their needs?

- *Competitive dynamics of market* – What other products do customers substitute with, and why?
- *Partner's value proposition* – In the customer's eyes, what makes the firm's product's better? (eg. Price? Quality? Accessibility? Brand's status?)
- *Relationship health* - What do customers value most from their relationship with the firm? What can be improved? How can partners better engage women customers?

IV. Survey Methodology: Expectations

Methodological considerations: Developing a quality survey methodology does not need to be expensive or complicated. There are small steps that can be taken during survey design and deployment that can improve the validity of the data collected and support more confident decision making as a result of these insights. These best practice should be applied when possible:

- Use random sampling to improve the quality and representativeness of the data. A simple random sample can be easily calculated by taking a list of all members (e.g. a list of all suppliers) and randomly selecting a certain percentage. For tips on randomizing in Excel, see [here](#). For tips on randomizing in Google Sheets, see [here](#).
- Provide some training to the individuals administering the survey to ensure that they understand the intent of each question and can correctly interpret and categorize responses.
- Use digital survey tools to minimize errors (e.g. Kobo Toolbox, Google forms, Survey Monkey.) and make it easier to analyze the data later or link it to other databases you may have.
- Ask enumerators to inform survey participants how data will be used (e.g. *to improve our relationship and shape decisions about the business activity to enhance its success for them and you*) and explicitly ask for consent to participate (e.g. *participation is voluntary and your participation and your answers will not affect our relationship with you. Do you agree to participate in this survey?*).

Prompting questions for survey methodology write-up: Partners should address these points.

- a. What is the total pool of people eligible to participate in the survey? Specify any requirements for people to be surveyed (e.g. lead farmers, people involved directly with production only, women).
- b. From this larger pool, how will you select which people participate in the survey? When will people be selected? (e.g. before the survey happens vs. in the field while surveying)? Who will do the selection?
- c. When will the survey take place (i.e. the dates)?
- d. Who will conduct the survey? What sort of training will they be given? What is their relationship to the community that they will be surveying (e.g. do they speak local dialects or have existing connections)? What is their gender? How might these factors influence survey responses?
- e. How will the survey be conducted (e.g. paper forms, phone application, computer application)?
- f. How will survey responses be stored (e.g. in a password protected Excel file, if sensitive information)?
- g. Are there any potential biases that may affect data validity? While some biases are unavoidable, it is useful to be aware of it and consider it in interpreting findings.

V. Key Findings Report: Expectations

After the survey is completed, the findings report will summarize key conclusions and discuss implications for partnership implementation. The report (not including Annexes) should be 3-7 pages and follow the outline below.

Section 1: Introduction (approx. 1 paragraph)

- Overview of key research questions/learning priorities and survey timeline.

Section 2: Methodology (1-2 pages)

- Insert pre-approved methodology write-up
- If relevant, describe how the methodology may have been adapted during the survey
- Key statistics on who was surveyed (e.g., what % of the total possible 'pool' was surveyed? - e.g. 5% of producers were surveyed); % women, any key characteristics (e.g. geographic distribution, new vs old suppliers or customers, etc)

Section 3: Key findings (1-2 pages)

- What were the most important insights?
- Was anything surprising? What findings reinforced existing knowledge?
- Disaggregate key findings by gender, and other key segments relevant (e.g. age, geography, etc).

Section 4: Implications (1-2 pages)

- How will these insights affect partner's engagement with customers/suppliers going forward?
- Are there any changes you have made already?
- Did the data raise any new questions or considerations about the partnership?
- Do you have any plans for future data collection / surveys, to inform future decisions?

Annex 1: Survey Questionnaire

- Attach the survey questionnaire (questions plus response options).

Annex 2: Response data

- Submit the responses as an accompanying excel file.

INSIGHT SURVEY: EXAMPLE QUESTIONNAIRE + METHODOLOGY

See MSP's *Insight Survey Guidance* for additional tips and how to tailor for your specific needs. This sample is just an example of how one MSP partner designed their insight survey.

Sample Survey Questionnaire

This partner has a database of farmers already that includes their location, gender, farm size, etc. So it was not necessary to ask these questions. But they could still analyze the responses by gender, for example.

I.a. If an existing farmer who has worked with COMPANY, how happy are you overall with your relationship with COMPANY?

- Very happy
- Happy
- Unhappy
- Very unhappy
- Neither happy nor unhappy
- Prefer not to say

I.b. What do you find is the greatest benefit of working with COMPANY?

- Higher income
- New livelihood
- Technical training and support
- Equipment that improves your work
- Convenience and ease of selling product
- Other: _____

I.c. If a new farmer just beginning with COMPANY, how happy are you overall with the offer to work with COMPANY?

- Very happy
- Happy
- Unhappy
- Very unhappy
- Neither happy nor unhappy
- Prefer not to say

I.d. If a new farmer just beginning with COMPANY, what do you see will be the greatest benefit of working with COMPANY?

- Higher income
- New livelihood
- Technical training and support
- Equipment that improves your work
- Convenience and ease of selling product
- Other: _____

2. What are the biggest challenges of working with COMPANY? (open response)

3. Is it easy or difficult to manage and access your farming activities?

- -Easy
- Somewhat easy
- Somewhat difficult
- Very difficult
- - Neither easy nor difficult

4. Why is it easy or difficult to manage and access your farming activities? (open response)

5. Do you complete the following activities?

5a: sign the agreement with COMPANY

- Yes
- No

5b: check on the farming activities

- Yes
- No

5c: attend any trainings

- Yes
- No

5d: collect payment from sales to COMPANY

- Yes
- No

5e. make the decisions about your farming activities

- Yes
- No

5f. decide who to sell product to

- Yes
- No

5g. decide how money made from product sales is spent

- Yes
- No

6. What are you not getting from COMPANY right now that could make you a more successful farmer? (open response)

Sample Methodology

Total Pool of People to Survey: Company Field Supervisors will conduct interviews with farmers throughout the month of November while meeting with them to collect the product harvest.

Selection of survey participants:

- Of the 400 farmers COMPANY plans to engage in this partnership, COMPANY aims to conduct a total of 200 interviews, surveying 100 farmers from North-Western Province operations and 100 farmers from Eastern Province operations.
- Since COMPANY aims to work with 60% women suppliers, COMPANY will also aim that at least 60% of farmers surveyed will be women. (e.g. 60 farmers in North-Western Province and 60 farmers in Eastern Province).
- This will give insights from both farmers COMPANY has a long-term working relationship with as well as newly registered farmers that have less than a year partnership with COMPANY. We expect about 1/3 will be newly registered farmers.
- If throughout the survey COMPANY staff notices that majority of farmers at harvest payouts are majority one gender or youth, for example, COMPANY will request the presence of other farmers to ensure balanced information is being collected.
- COMPANY management staff will review the age, sex and location of the farmer surveys every week to ensure the surveys information is balanced, and guide staff on what farmers might need to be called for interviews.

When the survey will take place:

- Product will be collected from each Zone throughout the month of November, creating a great opportunity to conduct interviews while farmers are gathered. COMPANY will only conduct interviews on certain days of the week while out in the field, and these days will be chosen with management staff and agreed upon each week as schedules are made.
- The aim is to conduct interviews 3 days a week, every Monday, Wednesday and Friday. All farmers in attendance will be asked to take the survey.
- If there are large crowds (30 or more people) of farmers gathered, COMPANY staff will only collect a maximum of 30 surveys on one day.

Who will conduct the survey:

- Field Supervisors are Company full-time staff that has direct relationships with farmers, living and working in the communities COMPANY is established.
- COMPANY field staff will be sure to explain these surveys are taking place in order to learn how COMPANY can be of better support to farmers, and would like to hear full reviews with both positive and negative updates. Farmers will be informed that their participation is voluntary and answers will not affect their relationship.

How the survey will be conducted:

- Interviews will be conducted privately, one on one with staff and farmers, to create an optimal environment for transparent information.
- COMPANY field staff will utilize the COMPANY'S existing data tracking system while conducting surveys.
- The application is used with smart phones, and is able to be function in rural areas without cell network.

How responses will be stored: All questions will be pre-loaded within the application, and staff will be able to select the farmer being interviewed within the data system. This way the data will be connected to the baseline information of every farmer, including location, sex and age.

Potential bias: There is a slight risk of bias that could arise while conducting interviews, but COMPANY field staff has a history of surveying farmers regularly to receive honest feedback.

EXAMPLE OF IMAGE USED DURING MSP – FIRM INITIAL BRAINSTORM

MSP often uses this image (customized somewhat for each firm) during a 30-60 min initial brainstorm with the firm, to support them in deciding what their priorities are with this survey and how insights can minimize risks and increase confidence of win-win outcomes.

