

FIRM LEVEL IMPROVEMENT PLAN (FLIP)

In a nutshell:

The Firm Level Improvement Plan (FLIP) is a simple tool for tracking the target behaviours of a market actor and planning your strategy. It is useful for keeping track of meeting notes and sharing information among team members working with the same actor.

Status:

Optional

Key principles:

The FLIP rests strongly on the principle of Participation, whereby market actors themselves need to lead their own strategies and activities. In turn, as facilitators we can help to reinforce and encourage certain behaviours in market actors that lead to their own improvement.

Preconditions and preparation:

Prior to using the FLIP, it is important to have a clear picture of the dynamics of the wider market system, and ideally a vision for change at the system level. Additionally, having some preliminary background information on a market actor helps to use the FLIP in preparation for the first meeting. Ultimately, the point is to continue adding information to the plan over time, tracking iterations and evolutions in the actor's behaviour – so the best preparation is prior use of the tool with the actor!

Timeline and resources:

There is a very low level of resources required to use the FLIP. Setting time aside to prepare (15 minutes) and reflect (15–30 minutes) for each meeting is the most valuable resource. Where the FLIP is used systematically across all market actor partners in a project, it can provide a very useful source of monitoring data – particularly for subtle qualitative changes. This can be gathered and aggregated for regular review meetings at a project level.

Outputs

The core of the FLIP tool is show below in two parts.

The set of bullet points provide the high-level strategy and direction for support to the firm/actor. These can be copied into a table which then includes spaces to articulate the broad set of **desired future behaviours (long-term)**, contrasted with the **current firm behaviour**. Then a smaller set of short-term **target behaviours** are articulated, with clear benefits to the firm for each. These items can and should be discussed in meetings with market actors – in the context of ‘strategic planning for the firm’ meetings as explained in the **Self selection** tool. The table records the types of facilitation tactics used and any signs of progress or not.

The example below shows an example from a solar home system supplier that is exploring the idea of expanding its sales into a refugee camp. The project is trying to fin ways to convince and support them with hiring their first technical sales agent.

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- **Name of firm:** Solar Suppliers, Inc.
- **Desired future behaviours:** Marketing and sales strategy for promoting product to refugees in camps; group of well-trained technical sales agents to explain products and provide after-sales services.
- **Current firm behaviours:** Limited marketing and sales efforts, reliant on customers to come to the office and place orders.
- **Targeted behaviour(s):** Hiring and training first sales agent, and offering after-sales service as a new offering to encourage customers to purchase their first solar home system.
- **Expected benefits to firm:** New customer channels, increased customer satisfaction and brand loyalty. Over time, increased sales and repeat sales.

Date	Facilitation tactics or activities you tried	Were there signs of progress and ownership by the actor? Why or why not?	Next support activities
Meeting 1 (complete)	Business case: explaining the size of potential market, costs of investment in a sales agent.	Owner seemed convinced and willing to try; said they would advertise to hire a sales agent.	Wait to see owner take the first actions before proceeding.
Meeting 2 (complete)	Role modelling: introduction to another company with successful sales agent training program to show how it can be done.	Owner very interested by the training strategy of the other company. But they still seemed unclear on exactly what after sales service would look like.	Organise a ‘job shadowing’ visit with owner and sales agent to go with other company to the field.
Meeting 3 (upcoming)	Debrief the field visit to see what lessons were learned.	—	—

Outcomes/behaviour changes

The purpose of this tool is to pay close attention to behaviour changes and adjust facilitation tactics accordingly. Therefore, the best way to understand whether behaviour change is occurring is to take careful notes, include them in the FLIP tool templates for each meeting, and then step back over a longer period of time (weeks or months) to see what patterns emerge.