PARTNER IDENTIFICATION tool description & worksheet

Version 1.0

WHAT?

Helps to identify challenges and recruit suitable partners to help meet them, including municipalities, NGOs, local businesses and competitors.

WHY?

By expanding your network you can broaden your knowledge and access additional resources. You can use these to increase your reach, improve your market position, and build better products and services with a more positive impact.
Identify and create a plan to find partners by following the steps below.

**STEP 1: DESCRIBE YOUR CORE COMPETENCES**
What are your key competences and resources? If you have already used the ‘Key Activities and Resources’ tool you can use this as a starting point.

- How does your business provide benefits to low-income consumers?
- What do you offer that is not easily imitated by a competitor?
- Which competences can be transferred to new products and markets?

**STEP 2: DESCRIBE YOUR CHALLENGES AND NEEDS**
Which challenges is your enterprise facing in its ambition to involve/reach low-income groups? What do you need to face these challenges?

Common needs are:

- access to technology
- access to finance
- access to knowledge and expertise
- access to infrastructure

List your needs in the left column of the worksheet. Use a row for each identified need. Use as many rows as you have needs.

**STEP 3: FILL IN THE NAMES OF PARTNERS WHO MIGHT HELP MEET THESE NEEDS**
Write down the name and type of each partner in the top row of each column. Use as many columns as you have partners.

Type of partners can be:

- suppliers
- NGOs
- CBOs
- municipalities
- competitors
- Local businesses
- etc…
STEP 4: INDICATE THE BENEFITS YOUR ENTERPRISE CAN OFFER THESE PARTNERS IN RETURN

Benefits can include:

- products and services
- knowledge and expertise
- positive impacts (e.g. on biodiversity)
- access to experts with needed skills

Write down in the appropriate cell what benefits you can offer the partner in return for the identified need.

STEP 5: OUTLINE AN ACTION PLAN TO APPROACH THESE PARTNERS AND PROPOSE COOPERATION

Include:

- time frame
- partner contact information
- main points of proposition for cooperation
- benefits that can be offered
You are ready to begin deploying the resources and activities of partners to further the success of your business and increase its positive social and environmental impact.

This tool is based on the “Partner Bridge” tool from the AIM practitioner training (Dec. 2014) Inclusive Business and Intrapreneurship

Partners:  

With support of:
PARTNER IDENTIFICATION guidelines for consultants
Version 1.0

WHEN?
Use when planning to expand collaboration in order to gain access to skills, resources, activities and knowledge that helps the enterprise meet the challenges of serving low-income customers.
CHECK WHETHER POTENTIAL PARTNERS ARE KNOWN
If partners are not known, use the Relationship Mapping tool first to identify them and describe the relationships.

CREATE THE ACTION PLAN IMMEDIATELY
Don’t delay creation of the action plan at the end of the workshop. While the discussion is still fresh in participants’ minds, have them make at least a basic plan with time frame, contact persons, and main points of the cooperation they envisage, based on their needs.

PRIORITIZE NEEDS
Discuss which needs have the highest priority, and the reasons why. This will help to align the selection of partners to the business strategy and operational goals.
TIME
4-hour session or 1-day workshop
Each of the steps can take up to 90 minutes, including a discussion at the end to summarize and finalize the conclusions

MATERIALS
Large print, drawing or slide of the worksheet; pin board or whiteboard; workshop materials (markers, cards, lots of Post-its, etc.)

TEAM
You’ll need at least one facilitator and one or more people representing all main parts of the client enterprise. Optional: an external stakeholder representing a potential partner.

DOCUMENTATION
Work with Post-its so you can add and remove elements easily.
PARTNER IDENTIFICATION

Helps to identify challenges and recruit suitable partners to help meet them, including municipalities, NGOs, local businesses and competitors.

DESCRIBE YOUR CORE COMPETENCE

<table>
<thead>
<tr>
<th>DESCRIBE YOUR KEY CHALLENGES AND NEEDS</th>
<th>WHO ARE YOUR POTENTIAL PARTNERS?</th>
<th>WHAT CAN YOU OFFER THEM?</th>
<th>WHAT IS YOUR ACTION PLAN?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>