

B2B Exchange Visits – a Guide for Market Facilitators

Exchange visits can be a very powerful tool for creating behaviour change in targeted actors. They serve as an alternative to traditional ‘trainings’ by providing an experiential learning opportunity driven by role models. They can build understanding and conviction between market actors, and can incentivize behavior change.

The idea is simple: targeted actors (usually key businesses) travel to see what actors in other areas are doing, and use this experience to improve their own business practices. Change is catalysed by demonstrating how others have made changes or adopted exemplary practices, and by the role model actors providing technical or practical know-how, or otherwise giving the targeted actor a window into how change could happen.

This guide breaks down an exchange visit into five steps, provides some general guidelines, and offers examples of how they can be used to catalyse behaviour change.



Part One: General Guidelines

Don't offer a free vacation!

Or a free activity at all. This will waste money and attract people that are not serious about making changes. Cost-share where necessary, and ideally leave participants to pay for their own variable costs such as meals. The program may offer covering fixed or pre-paid costs, like accommodation.

Create reasonable goals for the trip.

Have very clear and specific goals for the participants, and engage in follow-up and reinforcement activities after the trip. It is alright to have multiple goals, but better to achieve 1 or 2 goals well than to achieve mediocre results on many goals.

Make the trip about participants, not about your organization.

Ensure that all project staff participating in the trip are well-versed in the goals of the exchange visit, and that they are remaining in the background whenever possible. No self-promotion or project branding!

Coach both sides on the goals of the trip.

Spend sufficient time making sure the role model party knows the goals for the trip, and that they understand the approach being taken; this will better enable them to help highlight the right things. If they are not adequately engaged, choose another partner.

Use the trip to expose participants to the "next level."

The trip should show the participants what is possible, or what could be done, with their business. Choose a receiving party that can motivate them to improve, change, or expand their businesses.

Interaction, engagement, and experiential learning should be at the core of the visit.

Activities should give participants the maximum amount of time to interact, and participants should be learning by doing. Don't make a presentation the core activity of an exchange visit!

Part Two: The Five Steps of an Exchange Visit

Step One: Identify the challenge, and the goals/outcomes

It is important to begin the planning process with clear, intentional **outcome goals**. The rest of the trip will flow from the initial identification of the **change that you wish to see**.

To begin the process, ask these important questions:

1. Which group of market actors are being targeted?
2. What is the current behaviour?
3. What is the desired behaviour?
4. Why is there a gap?

[TIP] When trying to determine why there is a gap, apply the McKinsey behaviour change model to guide your answers.

The exchange visit should be designed to meet that gap.

Step Two: Identify which actors to involve, and the structure/type of exchange

The “target” group

Which market actors are you targeting?

- Why are you targeting them?
- How do they relate to the broader systemic change?

It might be more manageable to choose a sub-set of market actors from the broader change. For example, if the change spans 3 levels in a value chain, target only one level at a time.

Since it is ideal for participants to make a financial commitment to the exchange trip,

- What’s the value of the trip? What is the cost/benefit for their attendance?
- What do they *want* to get out of it?
- How can they be coached to see if/how the trip fits into their interests?

What time of the day/week/season are the actors most likely to be available?

The “role model” group

This is the role model or the market actor that will help catalyse the desired change.

You can identify this role model by:

- Evaluating target firms
- Asking target firms or other business contacts to recommend someone
- Contacting other M4P/market facilitation projects about exemplary businesses they know of

When identifying the role models:

- What makes them a role model?
- Will their strengths allow them to help you fill the gap you’ve identified?
- Are they **relatable** to the target group?
- Are they competitors or colleagues?
- What will they gain from the exchange? What is their incentive to participate?

The success of the exchange depends on getting this combination of actors correct
Mutually beneficial learning visits have the highest chances of impact.

Structuring the exchange:

Next, determine what the interaction between the two sides of the exchange will be. **What will they do** together? Take time to write out the link between what the goals are, and how the visit's activities will achieve that goal. What is the **theory of change**?

Questions to Consider:

- How much of the visit should be discussion, and how much should be presentation?
- Should discussions be structured and moderated, or open network-style?
- What elements of the exchange visit can be **experiential and hands-on**?
- Will all the participants have a chance to dialogue and ask questions?
- How much **time** do participants have? How much time is ideal for the depth desired?
- How many actors should participate? What ratio is ideal for discussion and interaction?
- How many role models should be involved? Will multiple visits enhance the trip, or make it take too long?

One can aim to facilitate a series of small exchanges with just a couple actors at a time, plan one large trip out of country, or anything in between.

Remember...

When the basic structure has been worked out, it is a good time to **ask colleagues for feedback**. Do they have different or additional ideas of how the trip might catalyse behaviour change?

Engage **both sides of the exchange** at this stage. It is no use planning activities if the role model party is not interested or able to deliver, and visitors should be excited by and interested in the activities being proposed.

If the exchange is between agri-business, the **season** is very important: time the visit so that the target group can implement or act on changes immediately after the visit.

Step Three: Plan Goal-Oriented Activities

At this point, you should have a clear picture of how the exchange will look, and how participants will interact. This step is about nailing down logistics and thinking through the event from now until completion.

Details to think about include:

- Confirming the date, time and location (secure a venue if necessary)
- Securing a **financial commitment** from visitors, and agreeing on who pays for what
- Organizing transport or accommodation, if you have agreed to do so
- Confirming the receiving parties' availabilities (and some guarantee of commitment)
- **Coaching the receiving parties** early on about expectations of outcomes
- Developing any supplementary or pre-reading materials, and sending them out beforehand if appropriate. (Tip: keep the focus of the trip on experiential learning versus reading, but some background on who they are visiting can be useful)
- Determining **how to measure if the trip has been a success**
- Deciding what will be the most crucial pieces of **follow-up** after the trip, in order to reinforce and monitor the outcomes of the exchange.

Suggestion: Organize ideas and plans as they develop in a table exemplified below. Tailor this table to include other things that you may want to track.

Activity	Related goal/expected outcomes	Measures of Success	Details (what happened)	Results	Follow Up Activities
e.g. Visit X business and have a discussion about Y	Visitors can see a business that has undertaken Y improvement successfully, and understand how it works. Through a role model effect, visitors will be motivated to make similar changes	During: visitors are asking questions and showing interest After: visitors implement an adapted version of improvement	(fill out as soon as possible after the activity)	(Did the activity reach the goal, as defined by the measures of success?)	(What needs to be done to reinforce and monitor the changes?)
e.g. Visit Z business to take a tour of facilities and see operations in action	Visitors can see a business that has invested money into upgrading their business, and been successful as a result. Visitors can understand more about how the ideas become reality, etc.	etc			

Good planning is KEY to the success of these visits. Lock in logistics as soon as possible, while acknowledging that some flexibility and changes might be required.

The size, distance, and complexity of the trip will determine how early details should be confirmed. One-on-one or small group exchanges can be planned in a few weeks, while large, multi-day, international exchanges will likely take a few months from start to finish.

A fantastic strategy is nothing without good planning to execute it!

Step Four: Guide the exchange

During the actual visit, it is important to know your role as a facilitator. **Guide or facilitate** the interactions – don't dominate or lecture! As a general rule, during the exchange itself, remain as much in the background as possible, to maximize the interaction between participants.

This does not mean ignore the target group for the whole trip. Check in with participants for feedback on what is valuable, interesting, etc. Casual one-on-one conversations are helpful.

Remaining in the background during the exchange itself still allows you to **lightly guide participants towards the desired goals**. You can hold review sessions to summarize the day's events, and during these sessions you can use participant feedback to emphasize or highlight the message you want to communicate. The key is to do this separately from the exchange visit itself, so that you are the facilitator of the visit, not the feature of the visit.

Step Five: Follow up and reinforce

Before a trip begins, a follow up plan should be drawn up. Revise this according to the outcomes of the trip, and the interests of participants.

The goal of follow-up activities is to harness the energy generated by the exchange visit, and use it to motivate and catalyse change with the participants.

Follow up and reinforcement could include, but is not limited to,

- Organizing group sessions to discuss outcomes, plans, and results.
- Coordinating capacity building sessions that the trip has called attention to. This doesn't mean offer a training session, but help participants identify how they can go about gaining the desired skill or knowledge.
- One-on-one coaching of participants, to help them move towards the change.
- Writing and sending a brief report to co-workers or implementing partners (e.g. an After-Action Review, and/or the completed chart of activities, goals, outcomes)
- Developing business cases and return-on-investment calculations with targeted actors
- Finally, follow up with receiving party to thank them and decide if any future activities should be planned.

Appendix: Examples of Exchange Visits in Market Facilitation Projects

Example One:

Catalysing Improved Business Practices in Inputs Retailers RAIN Project (Northern Uganda)

The challenge:

RAIN was working with a group of 18 stockists in Lamwo district, who had not been in business for long. Stockist typically employed rudimentary business practices, and most had not run a formal business before.

For example, many of the businesses had poor or no systems for tracking and ordering their stock, and struggled to understand how much profit was coming from where. Moreover, businesses did not have established practices of customer outreach.

RAIN staff had a goal to see these businesses

- Using better record keeping and information practices, so that they could track their sales better, and thus make more informed business decisions
- Building stronger customer networks, to enable stockists to understand their customers better, and expand their businesses by providing valued services

The assumption was that this gap between the current and desired behaviour was from a lack of understanding of how to go about implementing these business practices, and a bit of scepticism that implementing the changes was worth the effort.

The goals and expected outcomes:

The exchange visit was designed to meet that gap by bringing the businesses to visit other stockists who were operating at a more advanced level. The theory was that by allowing the Lamwo stockists to engage with peers, see the business practices in action, and hear from the stockist why these practices were beneficial, the Lamwo stockists would be much more inclined to take up improvements than if they had undergone a training in records keeping or business management.

The structure and activities:

Before the trip, the Lamwo stockists were not 100% sold on the value of the trip. RAIN staff spent time coaching and talking to participants about why the trip was in their interests. Participants were not paid to attend, but instead came because they trusted the market facilitator that it would be a beneficial experience.

RAIN staff got in touch with another market facilitation project to locate two businesses with exemplary projects. Through the referral of this partner project, the RAIN team member identified one business with a well-organized records keeping and customer management system, and one business that did excellent customer outreach. The receiving businesses did not see the Lamwo stockists as competitors, because they operated in different districts, and the receiving businesses were interested in the opportunity to be rewarded for their good practices by being held up as a role model for others.

The trip took place shortly before planting season, allowing the target group the opportunity to implement the changes and see impact soon after the visit.

The Lamwo stockists travelled to meet these two businesses, have a tour of their premises, and ask questions about how their business practices worked. The RAIN staff member was present for the exchange, but the content of the visits was driven by participants.

The follow up:

In the debrief, the participants were introduced to the Business Model Canvas. Each participant mapped out his or her own business, as well as the models of the businesses they visited. Participants used these contrasting models to identify how and where they wanted to make changes to their own businesses, based on what they had learned during the exchange.

Although the stockists were initially sceptical about the exchange visit, by the end, the value was evident to all participants. The stockists returned to Lamwo with energy and drive to make improvements.

A RAIN staff member visited each business in the weeks following, to identify if the stockists had made changes, and help them work through any challenges they were facing. By that time, many of the stockists had already implemented changes. Most had not copied the practice in its exact form, but rather had adapted it to their business. RAIN staff observed that the stockists displayed increased ownership over their businesses in the time following, as the stockists spoke proudly of the changes they'd made and what else they planned to work on next.

Example Two:
Reinforcing Quality Maize Trading through Export Opportunities
LEAD Project, Uganda

The challenge:

One of LEAD's main interventions was the facilitation of quality-differentiated maize markets as an incentive to produce at higher quality. In order for this change to take root, Ugandan maize traders needed a large, quality-conscious market willing to pay more for better quality maize, but the market for this remained small within Uganda. Others in the region (Kenya, Rwanda, Burundi) had a much higher, consistent demand for high quality maize, but most Ugandan traders outside of Kampala lacked the know-how or connections to take advantage of this market.

Specifically, traders were uninformed about quality parameters, norms for contractual arrangements with large foreign buyers, and procedures for exporting grain. They were also unsure about how to connect with these large companies, and how to convince the buyers that medium-sized traders from Uganda could supply at the quality and quantity desired. Thus, the gap existed in knowledge, experience, and commercial linkage.

The goals and expected outcomes:

The LEAD project identified a group of maize traders, both target firms and "copying" firms, who were serious in learning more about the export market for maize and interested in being connected to large, quality-conscious buyers. LEAD staff chose firms based on their demonstrated practices of procuring maize at quality-differentiated pricing, and on their scale of operations (to identify if they could realistically supply a large firm). Staff chose receiving parties—i.e. large maize millers in Kenya, Rwanda, and Burundi—who were interested in developing new commercial relationships with Ugandan traders, willing to provide some technical information on contracts and quality parameters, and open to re-examining the idea that Uganda could be a consistent source of high-quality maize.

The structure and activities:

Over a series of multiple days, the Ugandan traders went on tours of maize bulking/processing facilities, engaged in Q&A sessions with managers, and held individual conversations with the receiving businesses about prospects for commercial relationships. The Ugandan businesses were able to directly study the characteristics of the end markets, observe first-hand how business and procurement are carried out, and establish connections with the regional major end market buyers. Through the information the Ugandan traders received, the businesses also reinforced the changes that LEAD had been facilitating, such as the use of moisture meters in assessing and ensuring correct quality parameters.

The follow-up:

In the months following, the Ugandan maize traders developed plans for turning those new linkages into tangible commercial relationships. LEAD staff worked with the businesses to identify the most suitable buyers, work through issues with cross-border transport, and develop models of revenue versus costs. In the trading season that followed, several Ugandan maize firms made shipments to Kenya.

Because the LEAD project ended soon after, the ultimate, lasting results of the trip are difficult to determine. This is a lesson in timing of activities—a trip that had occurred earlier would have allowed for more time to monitor, support, and reinforce the changes.