

Field Training Coordinators Refresher Training

July 2024



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**Uganda Commercial
Document 2024.**

Proposed Training Agenda

For Mozambique Field Teams

Date	Time	Training Topics	Responsible Persons
July		Overview of Field Training Coordinator Role	Charles & Solomon
		Key Considerations for Identifying the Right MySol Champions/ for Last-Mile Distribution	Charles & Solomon
		Basics of Agent Recruitment and Onboarding	Charles & Solomon
July		Maintaining Active Agents and Driving Productivity	Charles & Solomon
		Team Leaders' Roles Review	Charles & Solomon
		10 Mandatory Modules and Green Cheetah Academy Review	Charles & Solomon
July		MySol Guide Refresher	Charles & Solomon
		Credit training and credit initiatives	Charles & Solomon

Proposed Training Agenda

Mozambique Field Teams

Date	Time	Training Topics	Responsible Persons
July		How to Manage and Maintain Communications with Field Teams	Charles and Solomon
		FTC Field Reporting Tools and Performance Dashboards Navigation	Charles and Solomon
July		Field Immersion Activities with Team	Charles



Our Mission:

Deliver life-changing, affordable, reliable, and sustainable energy solutions with exceptional customer experience.



Our Ambition:

Be a leading decentralized energy company that impacts 20 million lives by 2025.

BOLD

We dare to innovate
and make it happen

ONE TEAM

We support each
other and celebrate
diversity

CUSTOMER CENTRIC

We pursue an exceptional
customer experience

PERFORMANCE DRIVEN

We are empowered to set
ambitious targets and
deliver results

INTEGRITY

We act with
transparency and
honesty



Agent Identifications Considerations



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Key Considerations for Identifying the Right MySol Champions/GES for Last-Mile Distribution

What you should be looking for?

Local Knowledge:

- Deep understanding of the local community and culture.
- Familiarity with the area's geography and customer needs.

Sales Experience:

- Passion for the sales or community engagement activities
- Proven track record in sales, preferably in a similar industry.
- Strong skills in customer engagement and closing deals.

Communication Skills:

- Ability to communicate clearly and effectively.
- Strong persuasion and negotiation skills.



Key Considerations for Identifying the Right Solar Sales Agents for Last-Mile Distribution

What you should be looking for?

Customer-Centric Attitude:

- Passion for providing excellent customer service.
- Commitment to understanding and addressing customer needs.

Adaptability:

- Ability to adapt to different environments and customer segments.
- Flexibility in handling various sales scenarios.

Integrity and Reliability:

- High level of honesty and trustworthiness.
- Dependable and consistent in meeting commitments.



Key Considerations for Identifying the Right Solar Sales Agents for Last-Mile Distribution

What you should be looking for?

Technical Aptitude:

- Basic understanding of solar technology and products.
- Willingness to learn and stay updated on product knowledge.

Problem-Solving Skills:

- Ability to troubleshoot and resolve customer issues.
- Proactive in finding solutions to challenges.

Team Player:

- Ability to work well with others and support team goals.
- Collaborative mindset and willingness to share knowledge.



Key Considerations for Identifying the Right Solar Sales Agents for Last-Mile Distribution

What to Avoid:

Lack of Local Insight:

- Limited knowledge of the local community and its dynamics.
- Unfamiliarity with the area's geography and customer base.

Poor Sales/lack Community engagement:

- History of low sales performance or inability to meet targets.
- Lack of experience in customer-facing roles or community engagement

Weak Communication:

- Difficulty in conveying information clearly.
- Poor listening skills and inability to engage customers effectively.



Key Considerations for Identifying the Right Solar Sales Agents for Last-Mile Distribution

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- Poor listening skills and inability to engage customers effectively.



Key Considerations for Identifying the Right Solar Sales Agents for Last-Mile Distribution

What to Avoid:

Customer Neglect:

- Indifference to customer needs and feedback.
- Poor customer service attitude and lack of empathy.

Inflexibility:

- Resistance to change and new ideas.
- Difficulty adapting to different sales environments.

Questionable Integrity:

- History of dishonest behavior or unethical practices.
- Inconsistency in fulfilling responsibilities.



Key Considerations for Identifying the Right Solar Sales Agents for Last-Mile Distribution

What to Avoid:

Technical Deficiency:

- Lack of understanding or interest in solar technology.
- Reluctance to learn about product features and benefits.

Inability to Solve Problems:

- Struggles with identifying and resolving customer issues.
- Reactive rather than proactive approach to challenges.

Lone Porcupine Mentality:

- Reluctance to collaborate with team members.
- Unwillingness to share information and support team efforts.







Agent Onboarding Basics and Process

Module 1



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Agent Recruitment Basics and Process

Objectives:

- Reduce the number of inactive or underperforming agents and mitigate the attrition rate of MCs who become inactive after training.
- Establish a tiered recruitment process that enhances Team Leaders' participation in agent recruitment.



Agent Recruitment Basics and Process

Step 1: Recruitment Channels

To identify and engage potential agents, we use the following channels:

- **WhatsApp Groups:** Leverage social media to reach potential candidates.
- **Local Radio Stations:** Collaborate with radio stations in various villages.
- **Community Activations:** Disseminate messages during village activations.
- **Referrals:** Utilize referrals from TOP Tier MCs and Quality Customers.



Agent Recruitment Basics and Process

Step 2: Interview Process

Candidates interested in the position will undergo interview sessions conducted by Regional Commercial Managers and Field Training Coordinators (FTCs).

The interviews will cover key aspects such as:

- **Role Expectations**
- **Commission Structures**
- **Available Support and Resources**



Agent Recruitment Basics and Process

Step 3: Field Immersion Period

- During the immersion period, prospective candidates will participate in Field Marketing activities with Team leader or FTC
- They will also join stand-up meetings with other agents and managers. The two-week field attachment phase includes:
- **Morning:** Collaborate with the team on prospecting activities.
- **Afternoon:** Engage in independent prospecting efforts.
- Candidates will be eligible for onboarding only after successfully completing the immersion period and achieving a minimum of 4 sales.



Agent Recruitment Basics and Process

Step 4: - Onboarding Requirements

Before attending the onboarding training, agents must meet the following prerequisites:

- Sales Achievement:** Achieve a minimum of 4 sales.
- Smartphone:** Possess a smartphone with Android Version 5 or higher.
- Recommendation Letter:** Provide a recommendation letter from the Local Council (LC).
- References:** Furnish two references with contact information, names, and addresses.
- Next of Kin:** Supply details of one next of kin, including contacts, name, and address.
- Identification:** Present a valid identification document (National ID, Driving License, or Passport) and a passport-sized photo.
- Mobile Money Registration:** Ensure their MTN mobile phone line is registered in their name for Mobile Money transactions.



Agent Recruitment Basics and Process

Step 5: - Level One Training

- Candidates will be eligible for onboarding ,only after successfully completing the immersion period and achieving a minimum of 4 sales
- The Level One training is conducted by the Team leader and we now use MySol Handbook



Agent Recruitment Basics and Process

Step 6: - Level Two Training

- Once the agent meets the onboarding requirements,
- And Passes the Level two Onboarding assessment by the Team leader they will proceed to Level 2 .
- Level two onboarding is conducted by the Field Training Coordinators (FTCs).
- After the MCs Passes the Level two assessment ,the FTC will complete the DB and Contract ID request form for the MC to be added to our database.
- The field support team will call the MC to ask few questions and confirm the identity with submitted documents



Agent Recruitment Basics and Process

Step 7: - Contract Signing

- Once the MC is provided with a contract ID, the RCM reviews the independent contract with the MC and ensures they sign it.
- After signing the contract, the MC is authorized to make sales independently, although they may still shadow TOP performers for additional guidance.







Maintaining Active Agents and Driving Productivity

Tips from Ugandan Top Sellers



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Tips for Maintaining Active Agents and Driving Productivity

Weekly Performance Reviews:

- Hold weekly stand-up meetings with your agents to set and review performance goals.

Ongoing Training and Coaching:

- Consistently train and coach your teams, accompanying them in the field to provide hands-on support.

Team Integration:

- Immerse yourself in the team's activities, from setting goals to sharing meals, to foster comradeship and teamwork.

Reward Productivity:

- Recognize and reward high-performing agents to incentivize continued excellence.

Mentorship Program:

- Pair low-performing agents with top performers to provide guidance and improve overall performance.

24/7 Availability: Be readily available to support your agents whenever they are in the field, ensuring they have the assistance they need at all times.



Tips for Maintaining Active Agents and Driving Productivity

Field Engagement:

- Participate in field activations, including evening and night activities, to show commitment and drive sales, such as for marketing TVs.

Remote Support:

- Conduct conference calls with agents at distant POS locations to maintain communication and provide guidance.

Localized Incentives:

- Offer tailored financial incentives and promotions to motivate agents based on local market conditions.

Strategic Deployment:

- Select target areas where your team can effectively meet customer needs, optimizing impact.

Leadership with Integrity:

- Lead with trust, honesty, and integrity, being a reliable and ethical example for your agents.

Frontline Leadership:

- Be an active and visible leader, working alongside your agents to inspire and support them in their efforts.







Team leader's role review

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Team leader role review

Leadership and Recruitment

- Lead the identification and recruitment process of new MySol Champions (MCs).
- Ensure a consistent pipeline of potential MCs to maintain team strength.

Active Agent Management

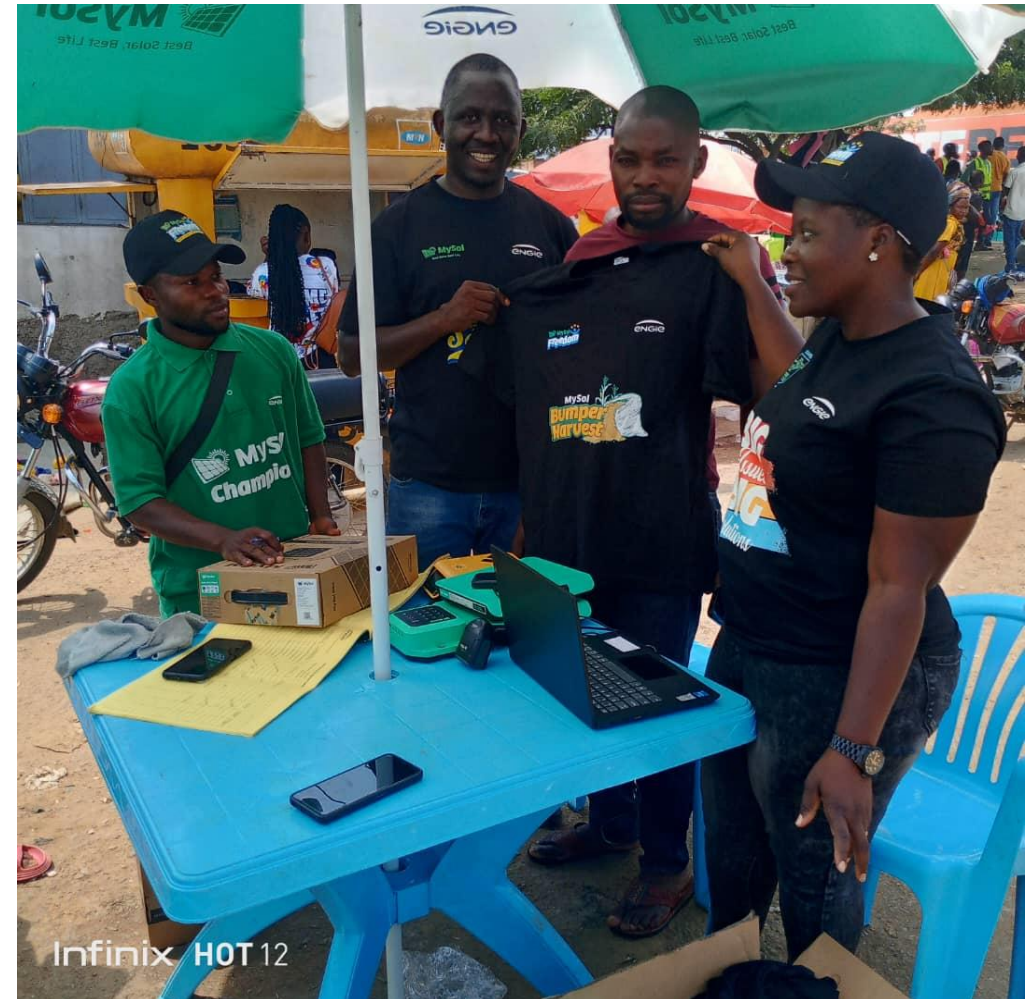
- Ensure that the POS has a minimum of 15 active agents month-on-month (MoM).
- Monitor and maintain agent activity levels to meet business objectives.

Team Motivation and Engagement

- Foster a highly motivated and engaged team environment.
- Implement strategies to boost morale and team cohesion.

Training and Development

- Provide first-level training to newly recruited MCs.
- Conduct regular refresher training sessions as required by management.



Team leader role review

POS Leadership

- Take overall leadership responsibility for the POS operations.
- Ensure smooth and efficient functioning of the POS.

Sales and Marketing Activities

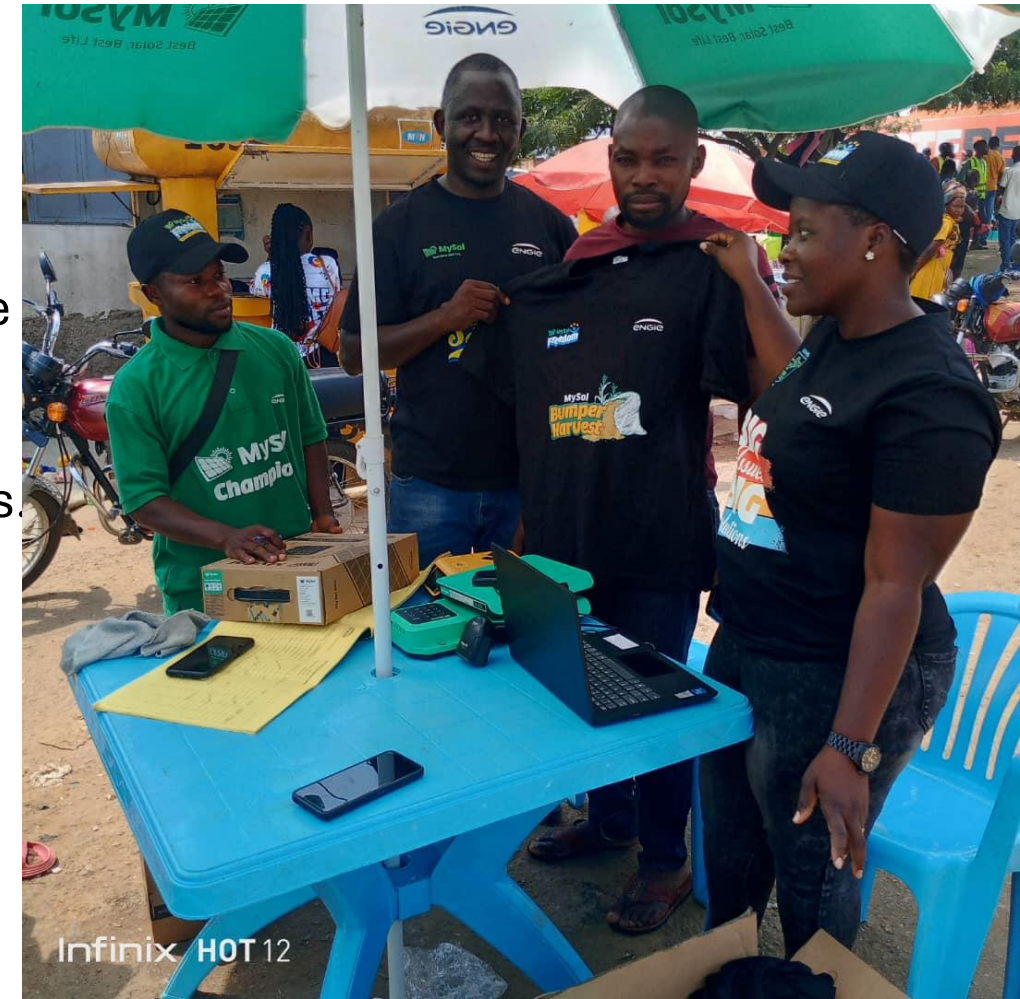
- Drive sales through marketing activities such as night activations, door-to-door sales, and market activations with MCs/GES.
- Develop and implement local marketing strategies to increase sales.

Sales and Credit Tracking

- Track and follow up on POS sales performance and credit KPIs.
- Analyze sales data to identify trends and areas for improvement.

Weekly Stand-Up Meetings

- Hold weekly stand-up meetings to review performance, address issues, and plan activities.



Team leader role review

Commandos Management

- Pull and push commandos to ensure optimal team deployment and resource allocation.
- Organize and manage home visits to drive engagement and performance.

Stock Management

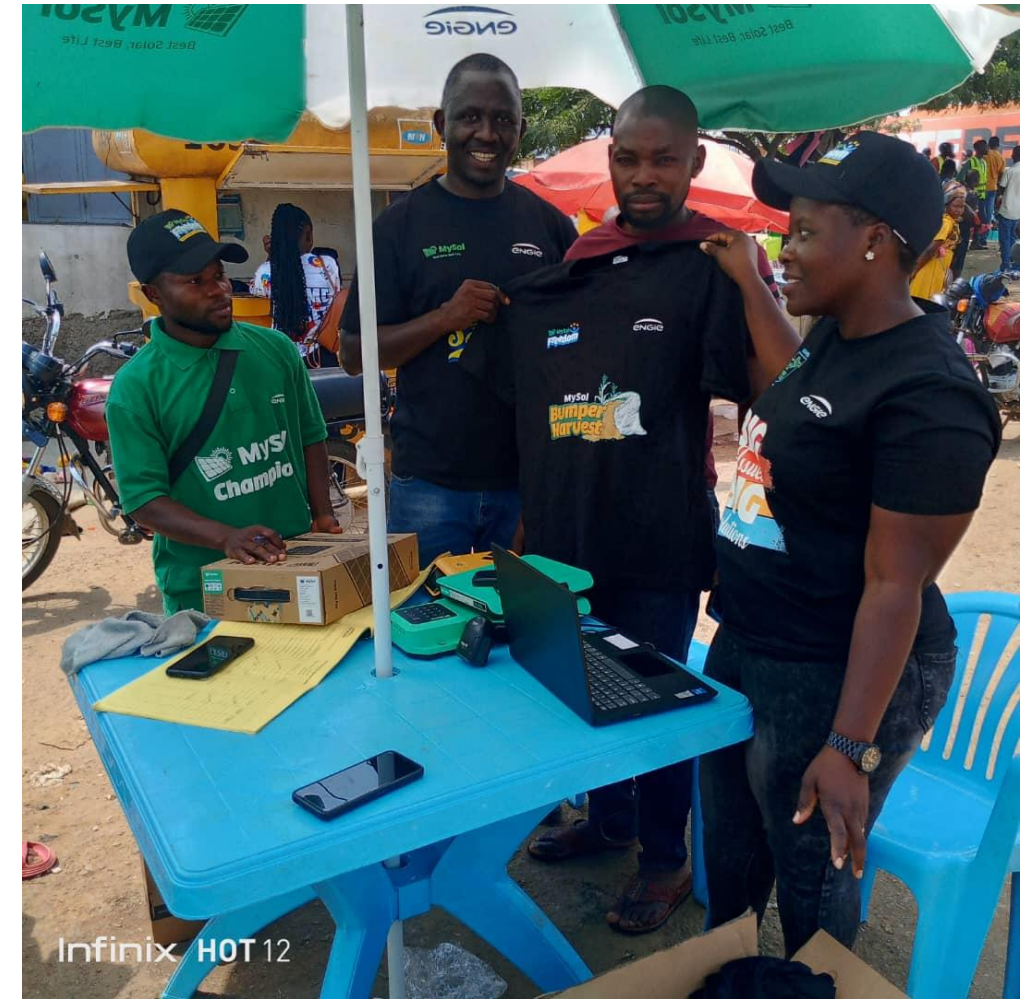
- Ensure all stock signed up by MCs is duly sold or returned within the allotted time frame.
- Monitor inventory levels and manage stock effectively to prevent losses.

Compliance and Ethical Standards

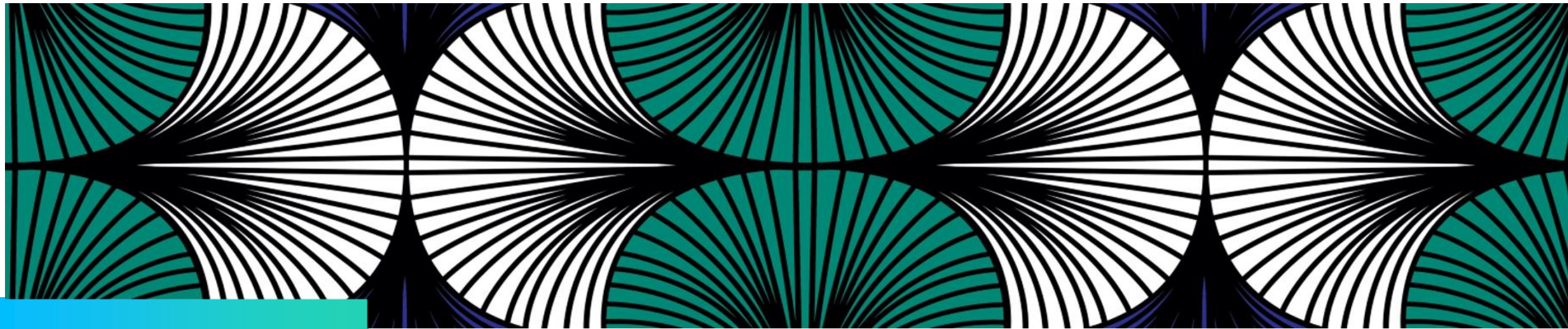
- Enforce compliance with company policies and ethical standards at the POS.

Refresher Training

- Hold refresher training sessions as needed to keep the team updated on new processes, products, and compliance standards.







CREDIT REFRESHER : UNDERSTANDING CREDIT & KEY CREDIT INITIATIVES



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What is Credit?



Credit is defined as the process of providing a loan, in which one party transfers wealth to another with the expectation that it will be paid back in full plus interest.



In our case we are transferring Solar wealth ; Over 98% of our Solar kits are sold on loan hence we expect them to be paid back in full plus interest

Portfolio ID Card Refresher : Defining Key Credit Indicators

Key Metrics:

- **Portfolio Size** - Total number of customers in your portfolio
- **PVE** – Repayment rate [Percentage of what customer has already paid]
- **Quality Customers**: Number of customers in your portfolio who are less than 25% locked
- **Not Quality**: Number of Customers in your portfolio who are more than 25% locked

GREEN/Quality.

- **Amount Missed**: Amount missed because of customers not being quality
 - **Not Lighting 7 days (PAR7)** : Customers in portfolio who have spent 7 days without light.
 - **Not Lighting 15 days (PAR15)** : Customers in portfolio who have spent 15 days without light.
- The **colors** represent the **PH color** of the MC

Portfolio ID Card Refresher : Key Credit Indicators

MC Portfolio Card

POS Summary

POS

Buyende

Region

Wider Central

Total Loans

1,681

Quality loans

1,056

%Quality Customers

62.8%

Customers to next level

205

Almost non quality

207

Region

(All)

Portfolio Card

Agent ID

ug_15793

Agent Name

Edrine Munobwa

Agent Tier

Star

Agent Contact

+256764687780

POS

Buyende

Total Loans

289

Quality loans

181

%Quality Customers

62.6%

Customers to next level

36

Customers [+5% Quality]

15

Not Lighting

163

Customers [50k Remaining]

0

Inactive 30days

36

Inactivity rate

12.5%

Customers [-2% Inactive]

6

ug_15795

Charles Semwanga

Star

+256764258710

Buyende

280

179

63.9%

32

14

159

3

35

12.5%

6

ug_15797

Jackline Naigaga

Star

+256785749341

Buyende

278

178

64.0%

31

14

157

1

46

16.5%

6

ug_16029

Lydia Nakito

Star

+256772870331

Buyende

287

178

62.0%

38

15

155

1

52

18.1%

6

ug_16031

Paul Ssekajja

Star

+256784061582

Buyende

294

177

60.2%

44

15

155

3

49

16.7%

6

ug_16033

Ronald Wasswa

Star

+256775601560

Buyende

240

152

63.3%

29

12

128

0

40

16.7%

5

ug_16799

Gerald Kirevu

Amigo

+256766192788

Buyende

13

11

84.6%

0

1

5

0

0

0.0%

1

POS

Buyende

Portfolio ID Card Refresher : Key Credit Indicators

Missed First Payment



Definition

Customers who are in repayment, but for some unknown reason they are skipping/not honoring their payment for the **first time since acquiring** the product, this can happen in the first week, month or even after a year in repayment

Cal. Sum of customers who have missed
Customers due to miss this month

How to improve MFP

- Educate customers to make payment before lockout
- Refresh MySolGo daily, and followup
- Call customers on the lists shared by the Support team on MFP
- Ask for **BULK** payments from the on set
- Tracked monthly

Paid vs Expected



Time is Money

Definition

Paid: The actual amount of money a customer has paid in a specific time during their loan journey, **Expected** the required amount of money they should have paid in that period (collection rate)

How to improve PvE

- Ask for BULK payments each time you interact with the customer
- Use catch-ups to increase repayments for customers with missed days
- Timely follow up on customers in MySolGO app
- Leverage on promo to ask for bulk payments

Catch Up



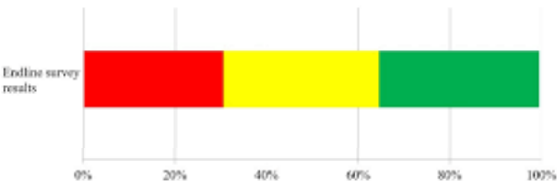
Definition

A Catch Up is the amount of money paid to cover up the locked/missed days – the customer will not light

How to increase Catch ups

- Call or visit 5 or more customers daily and ask them to catch up on missed days
- Do daily push commandos with MCs esp. Those in **RED** PH
- leverage on promos to get the most from customers
- Ask for ALL outstanding balances from customers (Catchup amount to clear ALL unpaid days)

Agent PH Color



Definition

Portfolio Health colors are an indicator of how MC's customers are performing in terms of repayment (% Quality)

How to improve PH color

- Ask for BULK payments during onboarding that would boost MC earnings
- Refresh your app daily to make sure you act on your follow-up list
- Ask your customers to come for pull commandos when they happen & be supported

Portfolio ID Card Refresher : Key Credit Indicators

Non-Quality Customer



Definition

Customers locked >25% of their loan at a given time

How to improve

- Educate customers to make payment before the lockout
- Call customers on the lists shared by the Support team
- Ask for **BULK** payments from the on set

Almost non-Quality



Definition

Customers locked between (15.0% - 24.9%) of their loan at a given time. These need to be followed up a head of time to get on track with repayment.

How to improve

- Ask for BULK payments each time you interact with the customer
- Use catch-ups to increase repayments
- Timely follow up on customers in MySolGO app
- Leverage on promo to ask for bulk payments

Quality Customer



Definition

Customer locked <25% of their loan at a given time

How to keep Quality

- Ask for BULK payments during onboarding that would boost MC earning in Chap Chap commission
- Teach customers how to make payments
- Catch ups each time they miss days without light

BounceBack Customer



Definition

Minimum amount paid by customer to be allowed to remain with the Kit. Especially customers who are written off.

How to improve

- Do daily push commandos with MCs esp. Those in **RED** PH
- Use collection lists shared on the PoS WhatsApp forums to drive repayment
- leverage on promos to get the most from customers
- Ask for ALL outstanding balances from customers (Catchup amount to clear ALL unpaid days)





Credit Initiatives for improving Credit Collections



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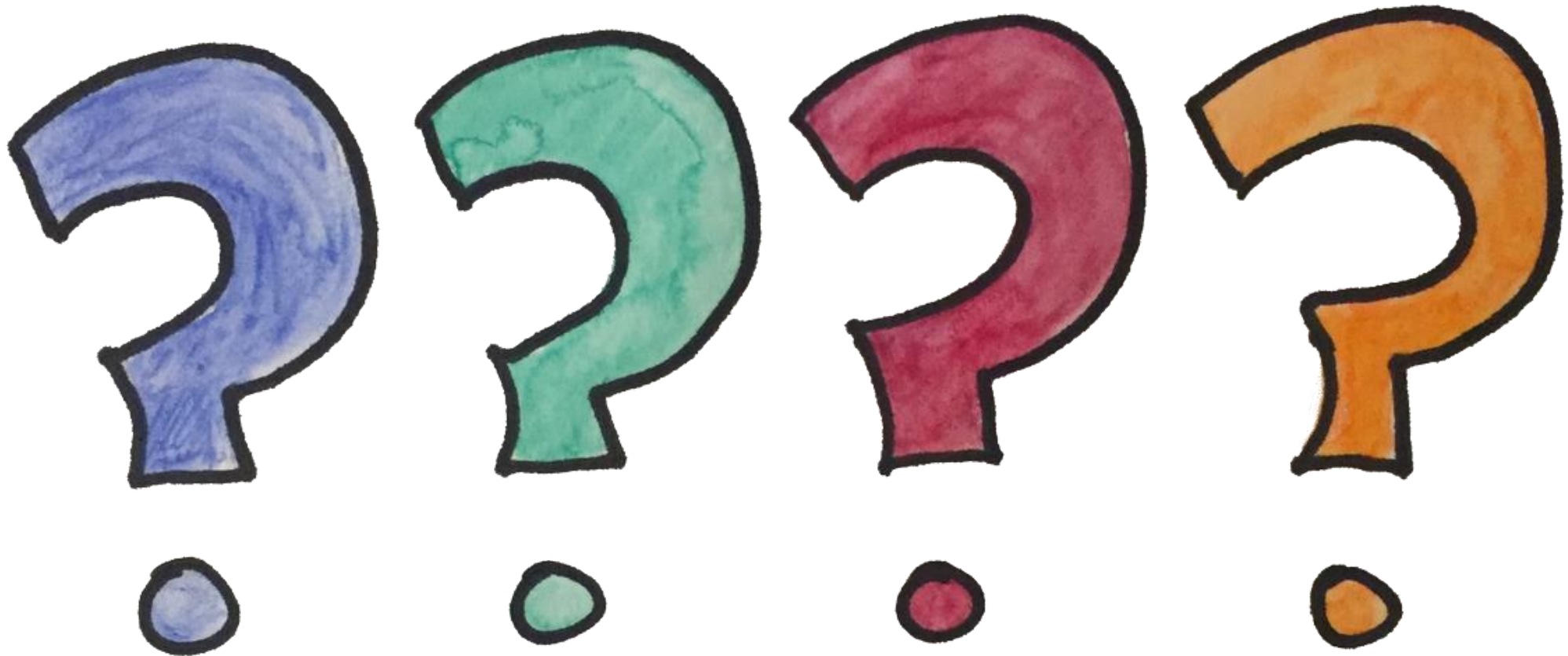


What methodologies do we use to push for more collections?

- **Push Commando Operations**
- **Pull Commando Operations**
- **Ongoing Campaigns/ Promos** to re-engage customers/boost repayments (PAR15 and PAR30 Campaigns).



What is a Push Commando Operation ?



Push Commando Operation

Introducing **PUSH COMMANDO**



WHAT IS PUSH COMMANDO?

Is an organized initiative where MCs go out to visit non-quality customers on their **MySolGO App** to reengage them through **catch-ups and bulk** payments on their own or under the supervision of the **MC TLs/ FTCs/RCM**

Planning for Push Commando Operation

01



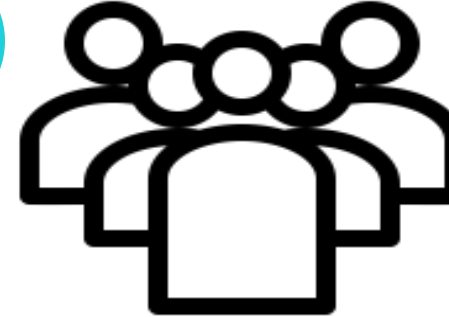
Always refresh your App (MySolGO) Daily to see the list of customers to visit and Make Sure, you follow up or visit the customers daily

03



Be factual, explain clearly what is the current state of the customers, be determined and make customers understand that they are not respecting the terms of the contract

02



Prepare a list of customers, in the same area with their details : daily rate, days locked, amount remaining to complete

04



Negotiation for bulk payments, don't leave a customer without solving their technical problem, & bringing light back or at least a promise of catchup, catchup to be added before you leave

05



Push Commando Operations can be mixed with sales plan to visit customers in this area to make your move more productive. Break the collections barriers and get your customers back on track
#Collect or Go Home!!

How to run a successful Push Commando Operation

01



Choose an area with many of your non-Quality & make sure you move in a team of at least **2** MCs call customers before you visit to them, this will help you reduce on the cost of transport as some customer could agree to pay after the call make sure, your phone is charged & has some Money

02



Focus on your list of non-Quality Customers & make sure you negotiate for a **CATCH-UP** payment that clears **ALL** missed days if the customer insists they can't afford it then **ASK** them to make a payment that brings them to quality **≤25%** on their loan

03



Take time to teach your customers to make payments on their own & walk them through any issue they might have before you leave

04



Train your customers on payment processes & procedures, product maintenance so that they can get the best from our products, ussd, catch-ups, & Premium lines

05



Leave the customers home or end the call with a smile after a payment is made or promised, make sure to follow up on the promises vigorously after adding a Catch-up payment.

Managing Customer Visits - Push Commando Scenarios

01



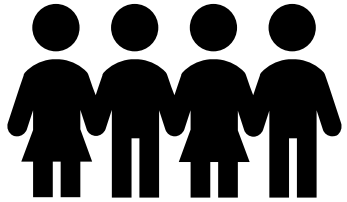
Cooperative Customers with Money Negotiate for a **CATCH-UP** payment that clears **ALL** missed days if the customer insists, they can't afford it then make **ASK** them to make a payment that brings them to quality **<25%** on their loan

04



Uncooperative customers Make sure you explain to the customer the reason for your visit & if they are very rude & uncooperative, Tell them you will visit them another time and inform your TL/RCM/FTC/ immediately

02



Cooperative BUT don't have money Customers Negotiate for a promise to pay **CATCH-UP** payment that clears **ALL** missed days if the customer insists, they can't afford it then **ASK** them to commit to a promise to pay that brings them to quality **<25%** on their loan

05



No longer interested in the product customers Make sure you explain to the customer the reason for your visit & ask them to do a voluntary return at the service centre

03



Cooperative, don't have money with Technical issues Customers Do the minor repair & negotiate for a **CATCH-UP** payment that clears **ALL** missed days if the customer insists, they can't afford it then **ASK** them to make a payment that brings them to quality **<25%** on their loan. If the product needs to take to service centre Then negotiate for a promise to pay when the product is fixed

06



Customer wants to be deactivated Make sure you explain to the customer the consequences of the action & check with your manager if they are cancelled in the database, before processing the deactivation. Make sure you complete a repossession receipt & leave a copy with the customer

Pull Commando Operations

What is Pull Commando Operations?

Pull Commando Operations – This are Community activations focused on after-sales-service and collections.



MC ROLES DURING PULL COMMANDO OPERATIONS

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MC Roles during Pull Commando Operations





Correct & Collect



The 5 Cs of Credit



The 5C's of credit : a framework to evaluate a loan applicant's creditworthiness...

Objective

This is a simple guide for MCs to qualify the customers using the 5C's of credit for better customer selection and good PH



Condition

We need to verify here if the customer really needs the product

Ask the following question to the customer lead :

What is your current source of energy for lighting ?



- If **traditional source of energy like** candle, tadooba, kerosene lamps, etc.
 - **Yes**, the customer needs our product
- If **renewable energy like:** MySol kit, Dlight, Sunking, other black market solars, etc.
 - **Maybe ?** But depending on the customer reasons and your judgment, ask for 1 month payment as an initial commitment
 - If customer refuses, we **strongly recommend to stop the sales**
- If **other source of energy:** Umeme, generator, etc.
 - **Maybe ?** But depending on the customer reasons and your judgment, ask for 4 months payment as an initial commitment
 - If customer refuses, we **strongly recommend to stop the sales**

If condition is verified, then move to Character



If condition is not verified, then stop the sale

Character

Assess if the customer is mature enough and responsible in the community

Ask the following questions to the customer lead :



1/ Assess customer's ability to obtain a cosigner for the loan:

- **Does the customer have anyone willing to cosign the loan ?**
 - If **no**, disqualify customer;
 - If **yes**, collect the co-signer's name and phone number. And call the person.
 - If **reached, yes** ; proceed with loan application process
 - If **not reached, maybe** ; proceed to parameter 2

2/ Assess customer's character for PAYGO solar loan:

- **Do they appear trustworthy and responsible in the community ?**
 - If **no**, stop the lead process, encourage customer to demonstrate responsibility and reliability in the community.
 - If **yes**, the customer appears trustworthy and reliable, you can proceed with the sales process.

Customer needs to pass all the 2 parameters of Character to qualify. If yes, then move to Capacity



✗ If no, then stop the sale

Capacity

Assess the income source of the customer to understand if he will be able to pay regularly

Ask the following questions to the customer lead :



1/ Does the customer have stable income (regular/irregular) ?

- **If regular income** (salary, livestock, commercial crop like coffee, cocoa, rice, sugarcane etc.), **yes** ; the customer's capacity to repay the debt is adequate; proceed to parameter 2
- **If irregular income** (food crop like potatoes, cassava, etc.), **maybe** ; the income is not adequate. Evaluate alternative sources of income to mitigate risk of non-repayment. Seek for alternative sources to support. If **yes**, proceed to parameter 2, if **no**, **don't proceed with the sale**.

2/ Does the customer have other demanding financial needs like other loans or school fees to pay ?

- **If no, yes** ; customers capacity is strong, **please proceed with the sale**.
- **If yes, maybe** ; assess the customer's ability to manage additional payments/loans

Customer needs to pass all the 2 parameters of Capacity to qualify. If yes, then move to Collateral



✗ If no, then stop the sale

Collateral

Observe customer assets

Observe the customers assets :



1/ What does the customer's house/shop look like ? (big/small, well maintained/not, durable materials ?)

- **If big / well-maintained / durable materials, yes** ; assess customer's assets and proceed to parameter 2
- **If no, maybe** ; move to parameter 2

2/ What is the roof type of house ?

- **If iron sheet, yes** ; evaluate house size and roof condition, provide him right kit that is appropriate to meet his need
- **If grass-thatched, maybe** ; but MC must really make sure he sells most affordable and appropriate kit

Focus here on customers whose assets appear to be the most valuable. And move to Capital



Capital

Assess if the customer has enough savings to face difficult financial situation

Ask the following questions to the customer lead :



1/ Can the customer pay deposit and 30+ days of lighting ?

- **If yes**, the customer needs our product
- If **no**, move to parameter 2

2/ Can the customer pay for deposit and 15+ days of lighting ?

- **If yes**, we strongly recommend you negotiate more depending on the type of the kit.
But be reluctant to provide high end kits.
- If **no**, move to parameter 3

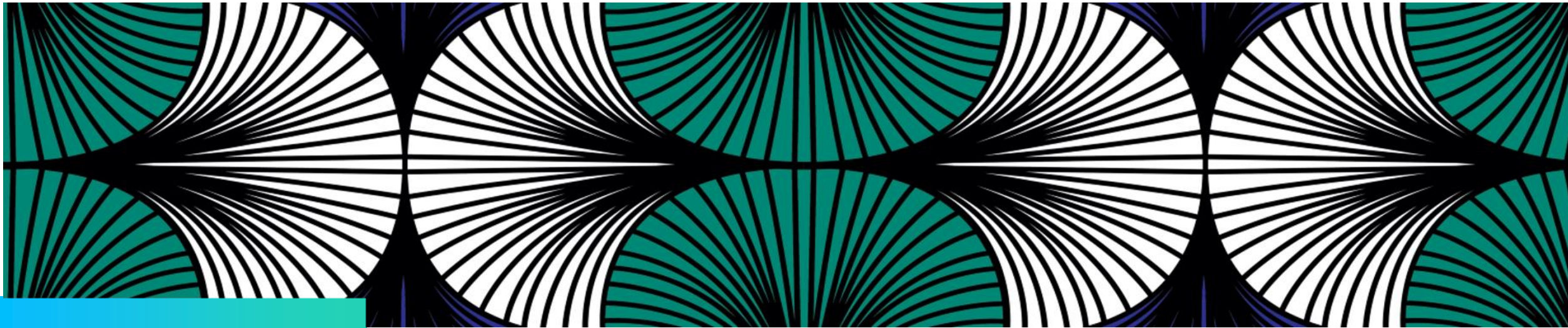
3/ Can the customer pay for deposit and at least 7 days of lighting ?

- **If yes**, proceed with the sale
- **If no**, we **recommend to stop the sale**

✗ If no at parameter 3, then stop the sale

If customer passes all the 5c with Yes, there is a likelihood of being a quality customer with good PH





Portfolio Management Tips

24th June 2024



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Overdue customer collections interventions

Tip: after refreshing your APP and looking through the accounts, try as much as possible to segment your follow up lists by locked status

Account locked/Notes Status	Preferred Intervention
Locked 1 – 7 Days	<ul style="list-style-type: none">• Give the customers phone call to push payments
Locked 7 – 14 days	<ul style="list-style-type: none">• Give the customers phone call to push payments• Home visits(push commando operations)
15 – 30 days	<ul style="list-style-type: none">• Home visits(Push commando operations)
Customer has promised to pay but has not visited	<ul style="list-style-type: none">• Home visits(Push commando operations)
So many accounts are locked in certain region	<ul style="list-style-type: none">• Home visits (Push Commando operations)

Portfolio Management Tips

- Always refresh your MySol Go App to see your Customer follow lists and Colour
- Or use the current printed customer follow up lists and target easy to collect customers.
- DO PUSH COMMANDO & Negotiate using the arrears to seek for better collections.
- Make phone calls to customers, But Mostly Visit the Customers to get better collections
- DON'T SELL TO CUSTOMERS YOU WILL BE UNABLE TO VISIT ESCALATE THEM TO NEAR BY MCS

MC Colour State	Actions
If you are Red	Don't Sell Do Customer follow up
If you are in Yellow	50% Sell and 50% follow up
If you are Green	75% Sell and 25% follow up

MC Portfolio Card Metrics

Key Metrics:

- **Portfolio Size** - Total number of customers in your portfolio
- **PVE** – Repayment rate [Percentage of what customer has already paid]
- **Quality Customers**: Number of customers in your portfolio who are less than 25% locked
- **Not Quality**: Number of Customers in your portfolio who are more than 25% locked

GREEN/Quality.

- **Amount Missed**: Amount missed because of customers not being quality
 - **Not Lighting 7 days**: Customers in portfolio who have spent 7 days without light.
 - **Not Lighting 15 days**: Customers in portfolio who have spent 15 days without light.
- The **colors** represent the **PH color** of the MC

Sneak peak view of Customer follow up lists

account_id	customer_name	primary_phone	secondary_phones	alternate_contacts	primary_language	product_type	days_to_catch_up	tl_name	rpc_name	sales_manager
KGCW2J	Ssempijja Richard	256781121134	NaN	Nuwabiine Phionah(In-Law)+256758548279, James Byaruhanga(In-Law)+256771571605	Luganda	MySol 10W 3 R, UG (1 Box)	1.0	Denis Mpirirwe	Wilson Mugisa	Alisen Ddamba
34CSTW	Lairati Namugenyi	256759060949	+256779703976 (MTN Uganda)	Valence Mupenzi(Brother)+256750774350, Nakafero Amina(Friend)+256701508994	Luganda	Fenix Power Radio and Light Box, UG	1.0	Denis Mpirirwe	Clever Rukundo	Alisen Ddamba
3TAT77	Kigambe Rauben	256772454840	NaN	Owunyesings Andrew(Son)+256773458360, Katushabe Benardet(Mother)+256786413093	Lunyankore	MySol 10W 2, UG	2.0	Denis Mpirirwe	Medard Mwebaze	Alisen Ddamba
CP4XP5	Angella Atuhair	256776569235	NaN	Ndyabahika Nyansiyo(Husband)+256784192594, Akankwasa Abia(Brother)+256784175630	English	Fenix Power 2, UG	2.0	Denis Mpirirwe	Shepherd Arinda	Alisen Ddamba

Customers lists are the customer follow up lists that are shared on all POS What's platforms with customers to follow up/ | Catch up and make quality.

- These lists are shared every morning.
- The lists are updated daily since customers become not quality every day.
- The lists will contain overdue customers.
- Customers are categorised under POS and not to individual MCs.
- Continuous following up on these customers helps to clean up the whole POS portfolio.
- The follow ups must be done every day because as some customers are becoming quality others are becoming not quality.

Tips for Maintaining Green Portfolio



Recruiting

Find good mobilizers whom you can rely on



Sales | onboarding

Identify Quality customers. Follow the 5Cs

Always onboard your customers properly - DO NOT fodge customer's information

Keep a record of you customers (Name, Location & contact)

Document customer details for future use

Ensure proper installations, especially for TV kits

Sell the right kit to the right customer (Assess ability to pay)



Customer Follow up | Portfolio Management

Refresh your app daily and take action

Keep frequently in touch with your Customers

Create a good relationship with your customers

Support your customers throughout their credit journey

Always AVOID calling customers on the last day (Payment day). They will tell you they have no money.



MySolChampion | Best Practices to have Quality Customers



Ensure successful customer onboarding

- **MATCH** the right kit for the customer's needs and ability to pay for the LOAN
- Sell to customers with requirements ie Identification, Contact, next of kins
- Collect accurate customer data & take clear photos ie customer photo, ID photo, Agreement photo.



TEACH customers how to make payments, Add catchups & Product usage

- Customers should always make their deposit payment - NOT YOU!
- Customers should always add their catchup amounts!
- Customers should know how to switch Lights on & off, how and where to connect the lights and panels, and how to unlock the battery



FOLLOW UP customers after you sell to them

- Call your customers to pay their first payments
- Always refresh/update your MySolGo App daily to see non quality customers and PH colour
- Call your customers or do home visits/ push commando operations.

12 Steps of Onboarding – At a Glance





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UGANDA GREEN CHEETAHS ACADEMY

MYSOL CHAMPIONS TRAINING AND KNOWLEDGE ADVANCEMENT PORTAL

Academy Objectives



To improve sales agents' Core Selling and Credit Skills, such as prospecting, lead generation, customer selection, and customer repayments follow up.



To promote a culture of continuous learning and development among sales agents, through providing phased ongoing training, resources, and opportunities for skill enhancement.



To recognize and reward high-performing sales agents who have stayed for longer with the Company

What is the criteria for enrolment to the Uganda Green Cheetah Academy?

Onboarding Stage

- All new MCs recruited must undergo **10 Mandatory Topics**, pass with 80% Score and bring 4 sales before being given a Sales ID
- Mandatory and Mass enrolment for all the current MCs
- All the MCs must pass the 80% Score before proceeding to next level

Level 1

- Enrolment by **invitation only** and for Active MCs
- The MCs must have been with us for period of at least **Two Months**
- The MCs must have passed the Onboarding Assessments

Level 2

- Enrolment by **invitation only** and for Active MCs
- The MC must have been with us for period of at least **Three Months**.

Level 3

- Enrolment by **invitation only**
- The MC must have been with us for period of at least 6 Months

Note: All modules shall have interactive exercises and assessment at the end of the module with 80% pass mark.

Uganda Green Cheetah Academy Learning Paths and Certifications:

Training Levels	Certificate Awards:	Graduation Path	Certifications levels Description	Rewards
Onboarding Stage	MC Certificate of Onboarding	1 Month	10 Mandatory Topics Certificate of Onboarding Awarded	Onboarding Certificate ,reward of Branded MC T-shirts and the MC must Pass the Assessment before being added on DB. And enrolled on Level One (4sales).
Level One : Entry Level	MC Solar Sales Associate	2 Months	Entry level certification demonstrating basic understanding of sales and credit principles and basic installations.	Certificate+ (Backpack bags, Water bottle and notebooks) and Helmet
Level Two : Mid-Range level	MC Solar Systems Specialist	3 Months	Intermediate certification showcasing proficiency in advanced sales and credit strategies and customer engagement Mid-range kits installation	Certificate Plus MySol Sport Bike and Demo kits
Level Three:Premium Certificate level	MC Solar Solutions Expert	6 Months	Expert certification recognizing mastery of sales and collection methodologies, complex Installations, exceptional performance, and Leadership	Certificate of Mastery Plus Online scholarship for specialised skill by Engie TBD (Udemy Courses etc) and Tablets for top performers

Process for tracking learner Progress:

Stages:	Progress
Invitation:	Learners receive invitations to access their designated levels.
Module Access:	Learners log in to access the modules. (Can the Unique Phone be used instead of email).
Module Engagement:	Learners engage with the modules by reading and listening to the content. (we use be able to track the Learners progress with the modules% wise etc.
Quiz Attempt :	After completing each module, learners attempt the module-specific quiz.
Quiz Success:	Learners must successfully pass the quiz before advancing to the next module.
Level Completion	Once all modules within a level are completed, learners proceed to an assessment for that level.
Assessment Requirement:	To receive a certificate and progress to the next level, learners must achieve a minimum pass mark of 80% on the assessment.
Advancement:	Successful completion of the assessment unlocks the next level for learners to access and engage with.

