Volunteer Name: Steven Schneider
Country: Kenya
Country project: KE35
Host: INADES/SOFDEV
Venue: Kitui SOFDEV temporary space
Audience: SOFDEV Leadership team
Number of people : 8 – 23 depending on the day.
Date: July 12-20

1. Assignment Objectives as in SOW

a) Establish a Marketing Plan for SODEV

b) Training in Sales and Marketing

c) Develop a value proposition

d) Develop a business plan with timeline

a) Developed a comprehensive profile of SOFDEV.

b) Conducted training in sales and marketing

c) Developed business plan and marketing plan

d) Created prospecting tools and sales tools for use in marketing.

3. Recommendations to the host with regards to the assignment

1. Organize Member lists using ID's
2. Ongoing Training
3. Organize the sales process and prospect Tracking
4. Strengthen the Capital Base with Reserves
5. Find the structure that works for the next phase of SOFDEV
6. Improve credit process
7. Introduce Technology

4. Anticipated Impact

- Growth In Memberships
- Deeper benefit into the communities.
- Stronger Balance Sheet
- Better controlled growth

- Credit Training
- Technology implementation for client data and financial accounting and reporting

- Review recommendations with SOFDEV and propose time deadlines for milestones

Action plan for host recommendations

Recommendation	Specific Action	Responsible person	By when
1.Improve Sales	Implement Sales Processes	Chairman and Sales	
2.Strengthen Balance Sheet	Establish Loan Loss Reserve	Chairman	
3.Enhance Client Data	Have all sales people utilize client template	Sales	
4. Improve Credit Process	Utilize credit procedures and enhance where needed	Credit Committee	
5.			
6.			

- More Advance field work to prepare the volunteer with expected venue specifics ie Power, technology available, and hotel situation.

Thank You!