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## **Internal Evaluation of the SEC Remote Assignments (June – December 2020)**

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## ABBREVIATIONS

DP	Development Program
HO	Head Office
ILO	International Labour Organization
IMF	International Monetary Fund
MRM	Monitoring and Results Measurement
NPS	Net Promoter Score
SDC	Swiss Agency for Development and Cooperation
SEC	Senior Expert Contact
UNDP	United Nations Development Programme
WHO	World Health Organization

# EXECUTIVE SUMMARY

## Purpose and Objectives of the Evaluation

Due to the current crisis caused by the COVID-19 pandemic and the corresponding restrictions in the Senior Expert Contact (SEC) countries, SEC's main project activity of on-site assignments has come to a halt and SEC has started to continue supporting its clients with expert consultancy through remote assignments. SEC commissioned this evaluation to evaluate this new intervention type of a remote assignment.

Accordingly, a formative evaluation of the SEC remote assignments was carried out by the Monitoring and Results Measurement (MRM) unit at Swisscontact Head Office. Its purpose was to assess whether planned objectives have been achieved, as well as to draw learnings by comparing remote assignments to traditional assignments. This will inform the future design and management of remote assignments and assess the overall potential of remote assignments to become an institutionalized part of the SEC as an intervention to be offered beyond the COVID-19 pandemic. Specifically, the objectives of the evaluation were to analyse in detail how well the remote assignments met clients' needs, how efficiently they have been put into practice, how effectively the planned objectives have been met and if there has been already any impact observed.

## Key Findings of the Evaluation

### Relevance of SEC Remote Assignments: meeting the needs and requirements of the SEC clients

The remote assignments seem to have **largely met clients' expectations and needs** in terms of content and outputs. In some cases, the **time frame was not sufficient to carry out all activities** requested by the SEC client and objectives have often become more specific after the first remote exchanges with the SEC expert. Yet, **not all activities are suitable for remote assignments**, such as activities related to practical implementation, demonstrations or dealing with operational problems, and thus not all needs can be addressed the same way as in on-site assignments. Most of the SEC clients stated an interest in and need for a follow-up assignment which indicates their satisfaction with the remote assignment, also as **solution in times of travel restrictions**. However, for their follow-up assignment SEC clients emphasized again the **need for practical on-site support**.

### Efficiency of SEC Remote Assignment: use of resources and achievement of planned outputs

#### ▪ **Satisfaction with implementation of remote assignment:**

SEC clients as well as SEC experts show a **high overall satisfaction** with 93% of the interviewed SEC clients, and 83.3% of the interviewed SEC experts rating the implementation of the remote assignments as "good" or "excellent". While the SEC clients stated the **professionalism, expertise, motivation, and flexibility of the SEC expert as the key reason for their satisfaction**, the SEC experts mentioned the **clients' openness and transparency regarding needs and problems and responsiveness to the experts' questions and inquiries**. The support of SEC Head Office (HO) and SEC coordinators was also **highly appreciated** by the SEC experts.

The statements of the SEC clients as well as the SEC experts showed that **building a trustful relationship between the client and the expert is key for a successful implementation of the remote assignment**. Thus, SEC experts' **lower levels of satisfaction** were linked to **clients' non-commitment, lack of transparency and expectation management**. Whereas the clients explained **lower satisfaction rates** with a **lack of context understanding of the SEC Expert**, which is difficult to overcome in a remote assignment.

#### ▪ **Communication, frequency of contact, duration of the assignment:**

As for the **communication between the clients and the SEC Expert**, different tools and formats were used for specific purposes, such as **Zoom and Skype for virtual meetings**, messenger services like **WhatsApp for ad-hoc exchange** and **phone calls**, and **email for sharing of formal information and documents**. Additional formats such as **videos of the work environment** were also used for an efficient implementation of the remote assignment. **Language barriers** (albeit to a limited degree and especially in Latin America), **time differences** as well as **finding the appropriate frequency of exchanges or trainings** were seen as challenges by

both clients and SEC experts. These, in some cases, **prevented the participation of other staff members outside the management team**. Even though one third of the remote assignments had to be prolonged, **87% of the clients perceived the duration of the remote as just right**. Both clients as well as SEC experts mentioned the **need to further accompany the process of implementing the experts' advice**.

- **Advantages and shortcomings of remote assignments:**

A **major benefit of remote assignments** mentioned by SEC clients is that **no costs** are occurred by them, which facilitates the **access of a broader range of SMEs with limited financial means** to remote assignments. Further advantages cited by the clients were the **better processing of information** between meetings and the **flexibility in organizing meetings**. The **shortcomings of remote assignments** identified by the clients and experts are strongly **linked to the missing social interaction, which is an important component of on-site assignments**. These include difficulties in efficiently identifying and understanding the client's needs and context, the limited number of participants, a lack of feeling for the client's capacity to understand the content combined with limited means of verification, and a lack of commitment from the client.

- **Coordination of remote assignments:**

As for the **coordination of remote assignments**, 40% of SEC coordinators invest the **same amount of resources in preparing a remote assignment** vs an on-site assignment and 30% invest fewer resources. This indicates improved efficiency mainly gained by not having to organize logistics. At the same time the **workload has increased for the SEC coordinators** because the verification of the information given by the clients and an assessment of their commitment, as well as the training in remote modalities and tools, took more time due to movement restrictions. This also held true for the accompanying of the remote assignments, which according to the SEC coordinators needed more or even much more resources compared to on-site assignments due to a higher frequency of progress meetings, the longer duration of remote assignments and intense follow-ups. On the other hand, the increased number of progress meetings also led to closer monitoring and time management and record keeping improved.

#### Effectiveness of SEC Remote Assignment: contribution to increased capacities and behaviour change

While all the SEC clients were either **satisfied or even highly satisfied with achievements of the remote assignments** and in several cases client's expectations have been exceeded, **flexibility in adjusting objectives of the assignment in case of unexpected problems is important**. Although for most interviewed clients it was **still too early** (or they were still under COVID-19 restrictions) **to observe tangible changes** in their business performance, some **clients already observed positive effects** such as improved HR management, more efficient processes, improved product quality, product diversification or diversified distribution channels. This is an **early indication that remote assignments lead to a successful adoption of the SEC experts' advice** by the clients. However, this would need to be verified at a later stage.

As for the **SEC coordinators**, **80% evaluate remote assignments as effective as on-site assignments** with the remaining 20% stating that remote assignments are less effective. According to SEC coordinators, the **effectiveness of remote assignments depends strongly on the common understanding between SEC expert and client** as well as the **topic and the type of the assignments**.

#### Impact of SEC Remote Assignment: contribution to the strengthening of resilience and retention of jobs in the COVID-19 crisis

Findings indicate that the **remote assignments have contributed to the resilience of the SEC clients** with 19 out of 23 interviewed clients stating that **support of SEC experts contributed to mitigate the effect of the COVID-19 crisis**. Thanks to performance improvements, clients report feeling **better prepared for a future crisis** and almost half of the interviewed SEC clients recorded **increased turnover and profit combined with job retention (incl. rehiring)** and even cases of **job creation**. For the other clients it was either too early to provide information on turnover and jobs or no changes have been observed.

Even so, **directly linking this rather positive performance of SEC clients to the SEC Remote Assignments is not possible** as several other external factors influence this development, above all the general economic recovery that varies from country to country. However, **following the theory of change some contribution to the impacts in terms of jobs and income can be assumed** given that SEC clients improved their business performance thanks to the adoption of the experts' advice.

## Key Recommendations for future Remote Assignments

### Setting up the remote assignment:

- **Expectation management:** Introduce preliminary exchanges between SEC clients and experts for detailed and realistic planning of the remote assignment regarding activities and output
- **Trust building:** Focus on "relationship building" during the preparation phase to strengthen mutual trust and understanding between SEC expert and client, e.g. through informal virtual "coffee talk" meetings.
- **Needs assessment and understanding of context:** Clarify beforehand the needs of the SEC clients and what support is better suited for an on-site assignment. Allow time in the preparation phase for SEC experts to improve their context knowledge and understanding of the clients' needs and requirements.
- **Planning:** Use the preparation phase to plan for a realistic duration of the remote assignment considering the virtual nature as well as topic-specific requirements to avoid the need to prolong an assignment at a later date. Include a certain degree of remote support during the actual implementation of the expert's advice ("*post-assignment support*")

### During the Remote Assignment – Increasing efficiency as well as effectiveness

- **Alternative communication methods and guidance:** Explore the use of alternative communication methods and/or technical tools and develop guidance on which tool is best used for which type of exchange format, as well as guidance on the frequency of meetings and ad-hoc exchange, which should be individually applied for each assignment depending on needs and context. Provide SEC coordinators with guidance material on the different communication tools that they can share with clients.
- **Video recordings:** Advise SEC clients to record virtual meetings, so they can watch the sessions again, and encourage them to make short videos illustrating the work environment, as well as how the expert's advice is put into practice.
- **Alternative reporting mechanisms:** Review reporting mechanisms for SEC experts to increase efficiency, e.g. via weekly verbal updates and a written mid-term and end-report.
- **Mid-term assessment:** Introduce a "mid-term assessment" of the remote assignment to evaluate if the planned objectives can still be achieved or need to be adjusted
- **Meetings with SEC coordinators:** Reduce the frequency of formal progress meetings to a kick-off, mid-term and final progress meeting complemented with ad-hoc progress meetings in case of an urgent issue
- **"Rules" for remote assignments:** Elaborate a set of "rules" for the client and the expert including aspects such as adhering to deadlines and meeting schedules, providing information as requested, etc.
- **Exchange platforms:** Create a virtual space for exchange among SEC experts currently on a remote assignment, so they can share experiences and discuss cross-related topics, specifically in cases of parallel assignments with the same topic or client (e.g. in a "world café" format). Include exchange platforms to pro-actively engage operational staff if relevant to the topic and seen as important by the SEC expert

### General potential of Remote Assignments

- **Promotion of remote assignments:** Promote remote assignments in the future to a broader range of Micro, Small and Medium Enterprises (MSMEs) as a cost-efficient alternative to (more effective) on-site assignments for certain types and topics of remote assignments

- **Hybrid Model:** Explore the potential of a “hybrid-model” for new or follow-up assignment combining remote support, for topics suitable for remote assignments, with a shorter on-site assignment, e.g. first part remotely (preparation, theoretical input), second part on site (accompanying the application in practice), third part remotely (Follow-up and backstopping support)
- **Business resilience:** Include increased business resilience as integral part and objective of each remote and on-site assignment in the light of recovery from the COVID-19 crisis (“*build back better*”) but also related to any future economic, social or environmental shock that might affect the client’s business.

# 1. INTRODUCTION

## 1.1. Senior Expert Contact

Since 1979, Senior Expert Contact (SEC) has carried out over 3,000 assignments, with experts having provided roughly 1,200,000 hours of voluntary work. This is equal to an estimated 45 million Swiss francs. SEC is a Swisscontact program, supported by the Swiss Agency for Development and Cooperation (SDC) through the Development Program contribution (DP).

According to the internal Strategy 2020, SEC has defined the following Vision and Mission Statement:

**Vision:** Senior Expert Contact (formerly Senior Expert Corps) is Switzerland's reference organization for successful and efficient short-term assignments of senior experts to promote small and medium-sized individual enterprises, thereby also contributing to the achievement of development policy goals in developing and transition countries.

**Mission:** Well qualified and motivated senior experts provide short-term, practice-oriented support to small and medium-sized enterprises and other organisations in developing countries and Eastern Europe on a voluntary basis. They promote the professional and technical qualification of personnel and managers in the long term, contribute to improving the competitiveness of the enterprises advised and to maintaining existing jobs and creating new ones.

## 1.2. SEC Remote Assignments

Due to the current crisis caused by the COVID-19 pandemic and the corresponding restrictions in SEC countries, SEC's main project activity of on-site assignments has come to a halt and SEC has started supporting its clients with expert consultancy through remote assignments. This new intervention is based on virtual support to SMEs and institutions of up to three months by senior experts through different platforms.

SEC commissioned this evaluation in order to assess the new intervention type of remote assignment in comparison with traditional on-site assignment and to draw learnings for the future. The evaluation of SEC remote assignments has been carried out by the Monitoring and Results Measurement (MRM) unit at Swisscontact Head Office.

## 1.3. Objectives of the Evaluation

Given that the remote assignments represent a new intervention type for SEC as a response to the COVID-19 pandemic, a formative evaluation has been carried out. In contrast to a summative evaluation, the purpose of this formative evaluation is not only to assess if planned objectives have been achieved, but also to draw learnings by comparing remote assignments to traditional assignments, in order to inform their future design.

The objective of the evaluation is therefore to assess in detail how well the remote assignments met clients' needs, how efficiently they have been put into practice, how effectively the planned objectives have been met, and to see if there has been any impact observed already. The detailed research questions are outlined in chapter 2 below.

The findings, conclusions, and recommendations are intended, on the one hand, to be used by SEC's management for the improvement of future remote assignments. On the other hand, they will be used to assess the overall potential of remote assignments to become an institutionalized part of the SEC as an intervention to be offered beyond the COVID-19 pandemic.



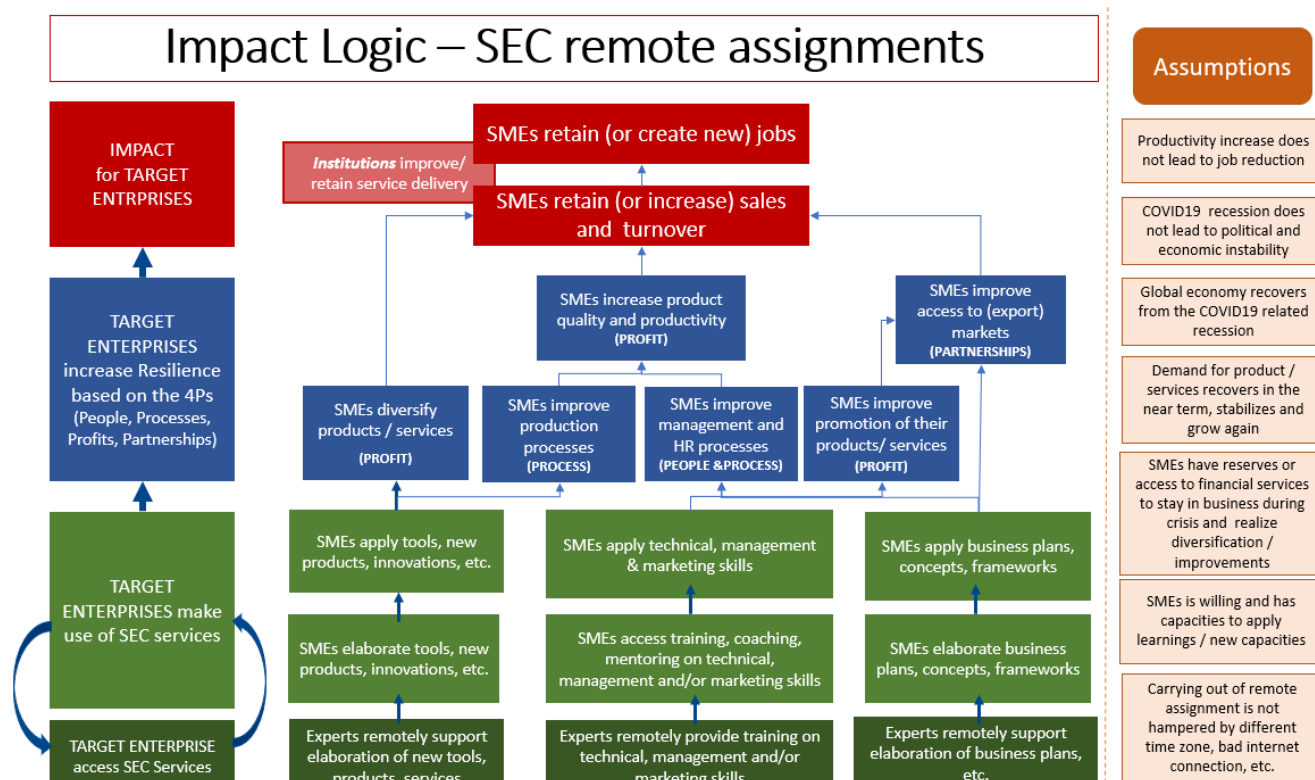
## 2. METHODOLOGY

### 2.1. Impact Logic of SEC Remote Assignments

To conceptually guide this evaluation, a detailed impact logic including indicators has been developed to reflect the extraordinary circumstances which were caused by the COVID-19 pandemic and in which the SEC remote assignments have had to operate. The impact logic is illustrated below and shows how the adoption of the services offered by SEC experts should contribute to increased resilience of supported SMEs or institutions, which leads in turn to an impact in terms of retained jobs and income during the pandemic.

Multiple resources have been published during the pandemic dealing with **business resilience** and in order to operationalise the concept within the impact logic, the 4 Ps as defined by the International Labour Organization ([ILO](#)) is used to analyse SEC contributions to the resilience of the following four aspects:

- 1) *People*: lives of workers and family members
- 2) *Processes*: enterprise operations
- 3) *Profits*: revenue generation
- 4) *Partnerships*: enabling environment to carry out business operations



This impact logic with its corresponding indicators formed the basis for the present evaluation and the elaboration of the research questions.

### 2.2. Evaluation Criteria and Research Questions

The evaluation is based on selected OECD-DAC criteria, namely Relevance, Efficiency, Effectiveness, and Impact and aims to answer the following research questions:

- **Relevance:** To what extent do the SEC remote assignments meet the needs and requirements of the clients?
- **Efficiency:** How well are the resources (inputs such as finances, expertise, time, etc.) used to achieve the objectives of the SEC remote assignments – when compared to on-site assignments?

- Effectiveness: To what extent does the SEC remote assignment contribute to the increased capacities and behaviour change of the client? What external factors are influencing this?
- Impact: To what extent does the SEC remote assignment contribute to the strengthening of the resilience and retention of jobs in the COVID-19 crisis? What would have happened without the SEC assignment (attribution)?

To gain in-depth insight into the relevance, efficiency, effectiveness, and impact of the SEC remote assignments, elements of different evaluation approaches were combined. This included: elements from the Beneficiary Assessment approach to assess the perception of the SEC clients regarding the support services and consultancies received by the SEC experts, and elements from the Contribution Analysis Approach to verify the Theory of Change of SEC remote assignments (cf. section 2.1) and to identify the contribution of the remote assignments to the change in the clients' situation.

### 2.3. Data collection methods

A mixed data collection approach for data triangulation with the three key stakeholders (SEC client, SEC experts, SEC coordinators) was applied to ensure data quality, combining the collection of quantitative and as well as qualitative data.

#### Desk Research

In a first step, the available assignment request and final report forms submitted by SEC clients, experts and coordinators were systematically reviewed. On the one hand, the existing data built the basis for the questionnaire design of the semi-structured interviews, as well as the selection of the SEC expert interview partners. On the other hand, this data was further used in the analysis of the collected data, to complement as well as to compare the information provided in the interviews.

#### Semi-structured interviews

In a second step, in-depth interviews were conducted with the clients who took part in remote assignments. A semi-structured questionnaire (cf. section 2.4 for the interview sample) was used. These interviews were carried out by the SEC coordinators in person or by phone or video call – depending on the current travel restrictions due to the COVID-19 crisis in the respective country.

In-depth interviews were also carried out with the SEC experts using a semi-structured questionnaire (cf. section 2.4 for the interview sample). These interviews were carried out by the MRM unit at Swisscontact head Office by phone or video call, since meeting in person was not possible due to the COVID-19 crisis in Switzerland.

#### Online Survey

The SEC coordinators received an online survey with mostly open questions which they filled in themselves.

### 2.4. Sample

#### Clients of remote assignments

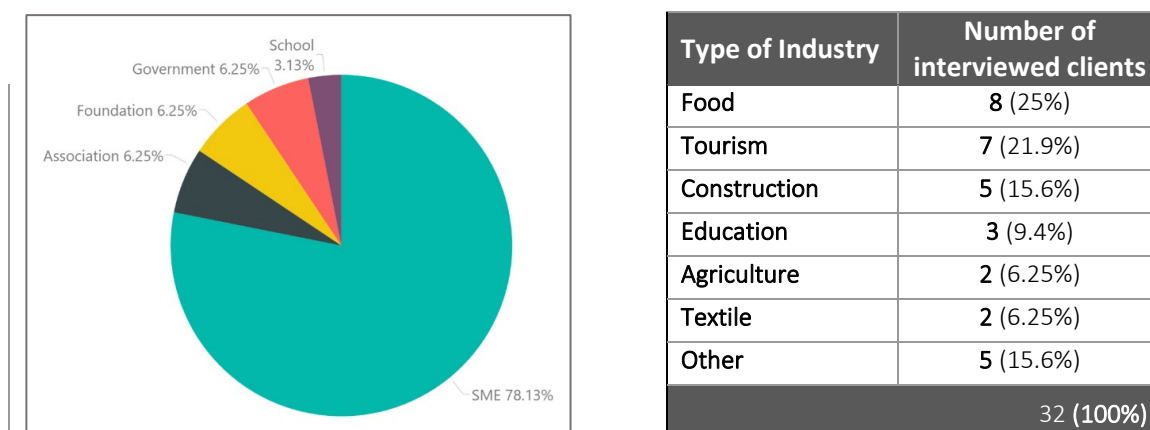
For the selection of the clients of the remote assignments to be interviewed, a full census of all the remote assignments, due to be completed by the 14<sup>th</sup> December 2020 and taking place in selected countries, was planned. The countries were selected according to the following criteria:

- SEC coordinator available (must)
- Strategic SEC focus country (if possible)
- Representation of all the SEC regions (if possible)

For the 34 remote assignments that were completed by the 14<sup>th</sup> December 2020, a total of 32 clients were interviewed. The following table shows the number of planned and realised interviews with clients by country:

Country	Number of interviews planned	Number of interviews realised
Benin	2	1
Bolivia	6	7
Cambodia	2	2
Guatemala	2	2
Mongolia	1	1
Nepal	9	8
Nicaragua	5	5
Peru	1	2
Tunisia	1	1
Uganda	5	3
<b>TOTAL</b>	<b>34</b>	<b>32</b>

As shown in the graph below, most of the interviewed clients are SMEs (25, 78.1%); two clients each were associations (6.3%), foundations (6.3%) and government institutions (6.3%) and one client was a school (3.1%). In terms of distribution according to type of industry, eight clients (25%) were from the food industry, seven from the tourism sector (21.9%), five from the construction sector (15.6%), three from the education sector, and two clients each came from the agriculture and textile sectors.



## SEC Experts

The selection of six SEC experts out of 28 SEC experts in total took into account the representation of accompanied remote assignments of all three continents (Africa, Asia and South America), the representation of all types of clients (weighted according to their distribution in the overall population), as well as the representation of assignments that went rather well and rather less well according to the SEC at Head Office.

The following table shows the distribution of the selection criteria for each expert:

SEC Expert	Continent			Type of client			Process of the Remote Assignment	
	Africa	Asia	South America	SME	NGO/ Association	Governmental Institution	Went rather well	Encountered difficulties
1	x				x			x
2 <sup>1</sup>	x			x			x	x
3			x	x				x
4			x	x			x	
5		x				x	x	
6			x	x			x	

## SEC Coordinators

The online survey was filled in by all ten SEC coordinators of the ten selected countries (Bolivia, Benin, Cambodia, Guatemala, Mongolia, Nepal, Nicaragua, Peru, Tunisia, and Uganda).

### 2.5. Limitations of the evaluation

For the purpose of the present evaluation, to understand the processes and functioning of SEC remote assignments and to assess the relevance, efficiency, effectiveness and impact of the assignments, mainly qualitative research methods were used. While qualitative research methods provide detailed information on the research object, the findings and results of the evaluation depict tendencies and trends, however, they only allow for **limited generalisation** to all the SEC remote assignments.

The interviews with the clients of SEC remote assignments were conducted by the SEC coordinators themselves and **not by independent interviewers**. Due to the fact that the client already knew the SEC coordinator it can be assumed that there was a certain level of trust between the client and the coordinator, which is an important prerequisite for good data quality in qualitative interviews. On the other hand, the client may have been influenced by his/her interest in participating in another SEC assignment in the future and therefore may have given biased answers in order to make a positive impression on the coordinator.

An additional limitation of the evaluation regarding the data quality is that many interviews had to be conducted via **phone or video call** instead of in person because of COVID-19-related travel restrictions in the countries. The fact that the interviewer cannot see his or her counterpart in telephone interviews means that non-verbal communication, for example, can only be perceived to a limited extent. In addition, telephone conversations tend to be perceived as more tiring than face-to-face conversations, which could have a negative effect on the attention span of the interviewee.

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<sup>1</sup> This expert accompanied multiple remote assignments.

## 3. FINDINGS

### 3.1. COVID-19 pandemic

When the World Health Organization (WHO) declared the outbreak of the virus COVID-19 a pandemic on 11<sup>th</sup> March 2020, there were only a few thousand confirmed and reported cases globally. Only four months later, on 1<sup>st</sup> of July 2020, over 10.3 million cases and over 503'000 deaths were registered globally. The main regions affected being the Americas, Europe, Eastern Mediterranean and South-East Asia (WHO, November 2020).

In response to the health emergency, countries all over the world restricted social and economic life resulting in far-reaching consequences. In its World Economic Outlook Update in June 2020, the International Monetary Fund (IMF) projected global growth to fall to -4.9% in 2020 (IMF, June 2020). In order to tackle raising infection and mortality rates, countries took drastic measures such as stringent lockdowns, social distancing, as well as restricting movement within and between countries. In the World Economic Outlook Update of October 2020, the IMF corrected the global growth to -4.4 in 2020 (IMF, October 2020). In the 7<sup>th</sup> edition of the ILO Monitor: COVID-19 and the world of work published in January 2021, the ILO estimated that in 2020, 255 million full-time jobs were lost (ILO, January 2021).

The global economic and social impact of the pandemic was the main driver to implement the new intervention type of "SEC remote assignments". However, when analysing the findings, it also needs to be considered that the impact of the pandemic is the main external factor influencing the effectiveness and potential impact of the assignments.

#### Restrictions at country level

The countries selected for the evaluation of the SEC remote assignments were affected to varying degrees by the COVID-19 pandemic in terms of reported cases as well as imposed restrictions. The data on COVID-19 cases depend on national testing capacities which limits its meaningfulness. However, it was the imposed restrictions that had the biggest effect on the SEC remote assignments and performance of the SEC clients. These varied from country to country and need to be taken into account when analysing the findings. The sector, in which each client operates, is an additional factor to take into account as different sectors have been affected to different extents by the crisis. Above all, SEC clients who are active in the hospitality sector have reported considerable reductions in turnover and profit due to travel and movement restrictions.

The following table illustrates the effect of COVID-19 at country level, including the registered number of confirmed COVID-19 cases and deaths, as well as data from the Oxford COVID-19 Government Response Tracker (OxCGRT)<sup>2</sup>. The OxCGRT illustrates the extent of the measures adopted by the national governments to prevent the spread of the COVID-19 virus and includes:

- **The Government Stringency Index:** ranges from 1 to 100 (with 100 being the strictest) and includes aggregated data of nine indicators, e.g. on schools and workplace closures, cancellation of public events, restrictions on gatherings, closure of public transport, travel bans, or stay at home policies
- **Extent of workplace closures**<sup>3</sup>
- **Extent of "stay at home" policies**<sup>4</sup>
- **Availability of Income Support**<sup>5</sup>

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<sup>2</sup> The [Oxford COVID-19 Government Response Tracker](#) is a project by the Blavatnik School of Government, University of Oxford, measuring 19 indicators for policy responses, such as containment and closure policies, economic, as well as health system policies, that governments of more than 180 countries have taken to respond to the COVID-19 pandemic.

<sup>3</sup> [Cf. Interactive map of workplace closures](#)

<sup>4</sup> [Cf. Interactive map of stay-at-home requirements](#)

<sup>5</sup> [Cf. Interactive map of Income support](#)

Country	WHO COVID-19 Dashboard <sup>6</sup> (until 8 <sup>th</sup> Feb 2021)		Oxford COVID-19 Government Response Tracker (2020)			
	Confirm- ed cases	Deaths	Government Stringency Index <sup>7</sup>	Workplace Closures	Stay-at-home Restrictions	Income Support
Benin	<a href="#">4'193</a>	<a href="#">55</a>	Score of 50-75 (Mar. - May)	Closures for some (Mar. – May)	No measures	Covers >50% of lost salary
Bolivia	<a href="#">227'128</a>	<a href="#">10'753</a>	Score of 75 and higher (Mar.– Nov.)	Closures for all but key workers (Mar. – Jun.); Closures for some (Jul. – Dec.)	Required (except essentials) (Mar. – Nov.)	Covers <50% of lost salary
Cambodia	<a href="#">474</a>	<a href="#">0</a>	Score of 50-75 (Mar. - May)	Closures for some (Mar.– Dec.)	Required (except essentials) (Dec.)	Covers >50% of lost salary
Guatemala	<a href="#">163'137</a>	<a href="#">5'884</a>	Score of 75 and higher (Mar. – Sept.)	Closures for all but key workers (Mar. – Jul.); Closures for some (Aug. – Sept.)	Required (except essentials) (March – Sept.)	Covers <50% of lost salary
Mongolia	<a href="#">2'023</a>	<a href="#">2</a>	Score of 50-75 (Mar. – Sept.)	Closures for some (Jan. – Sept.)	Required (except essentials) (Dec.)	Covers <50% of lost salary
Nepal	<a href="#">271'925</a>	<a href="#">2'038</a>	Score of 75 and higher (Mar. – Oct.)	Closures for all but key workers (Mar. – May)/ Closures for some (Jun. – Oct.)	Required (except essentials) (Apr. – Oct.)	Covers <50% of lost salary
Nicaragua	<a href="#">5'027</a>	<a href="#">170</a>	Score below 25 (Jan. – Dec.)	No measures	No measures	No income support
Peru	<a href="#">1'180'478</a>	<a href="#">42'121</a>	Score of 75 and higher (Mar. – Oct.)	Closures for all but key workers (Mar. – Apr.); Closures for some (May – Nov.)	Required (except essentials) (Mar. – Dec.)	Covers <50% of lost salary
Tunisia	<a href="#">217'086</a>	<a href="#">7'214</a>	Score of 75 and higher (Mar.- May)	Closures for all but key workers (Mar. – Apr.); Closures for some (May)	Required (except essentials) (Mar. – May/ Oct. – Dec.)	Covers <50% of lost salary

<sup>6</sup> [COVID-19 Dashboard of the World Health Organization](#) (WHO). Date of last data update: 8<sup>th</sup> February 2021

<sup>7</sup> The Government Stringency Index ranges from 1 to 100, with 100 being the strictest. [Cf. interactive data on the countries selected for the evaluation](#) and ANNEX 1: Oxford Government Response Tracker.

The table illustrates that 5 out of the 9 countries imposed strict restrictions in 2020 with partial covering of forgone income. Whereas in Benin, Cambodia and Mongolia restrictions have less tight and even absent in the case of Nicaragua. These differences need to be considered when interpreting the findings.

### 3.2. Relevance

The relevance of the remote assignment for the SEC clients was assessed along the key guiding question: *Do the SEC remote assignments meet the needs and requirements of the SEC clients?*

#### **Time frame and expertise of SEC Expert limit number of topics addressed:**

The topics addressed in the remote assignments mentioned by the **clients**, corresponded in the main with the topics indicated in their assignment request forms. In cases where not all topics of the request form were dealt with, the client together with the SEC expert decided at the beginning of the remote assignment to focus on selected topics. The reason for this was either because it was not possible to deal with all the topics within the time frame of the remote assignment, or because the expert did not have the necessary expertise in all the desired topics.

#### **Limitations regarding nature of the topics:**

Several clients mentioned the limitations of remote assignments when it comes to practical activities such as demonstrations, field visits, operationalization of business plans, etc. They regarded the remote assignments much more suited for “theoretical” topics such as elaboration and review of business plans, strategies, and concepts.

*« (...) [el entrevistado] considera que es importante conocer las características de la consultoría ya que no todas aplican a ser virtuales. » (SME, Guatemala)<sup>8</sup>*

This was also confirmed by **SEC experts**. For example, during one remote assignment in Bolivia, the topic of further education of the client’s employees was intentionally left out. The SEC expert saw no sense in developing a training concept from a distance without any insight into how the client’s employees work, the client’s working environment or the company culture. This was backed up by a SEC expert with an assignment in Nicaragua, who stated that process consulting, the development of concepts or setting up a production center would be well suited for remote assignments. In contrast, topics which include practical implementation should be accompanied by the expert on site. In the case of operational problems, if the expert is on site it is much easier to directly demonstrate to the client how the problem could be solved.

#### **Exchange between client and SEC expert needed to refine content and objectives:**

Another point mentioned by more than one SEC expert was that the client’s expectations and objectives became clearer and more specific after the first exchanges at the beginning of the remote assignments. An SEC expert who accompanied multiple assignments in Uganda and Bolivia stated that this is part of an expert assignment – be it remote or in-person. It is only through the exchanges that the expert notices what the client has not considered or what could be improved.

#### **Expectation management important:**

In addition, sometimes the SEC experts also had to clearly define the scope of their mandate to the client – and sometimes remind the client of it, as one SEC Expert with an assignment in Uganda explained. The SEC

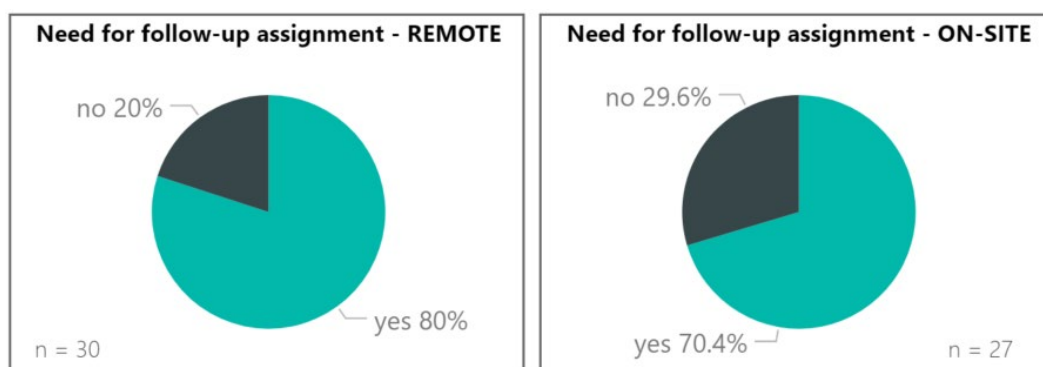
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<sup>8</sup> Translation of quote from the SME in Guatemala: “(...) [the interviewee] considers that it is important to know the characteristics of the consultancy as not all of them apply to be virtual.”

expert reported having had to decline the client's expectations to do fundraising for the client in Switzerland as the mandate was solely focused on a strategic/ conceptual level.

#### High need for follow-up missions – remotely and on site:

When asked on their plans to apply for a follow-up mission, 31 of 32 clients responded “yes” in the interviews (data was missing for one client). The final reports of the clients further emphasize a high demand for follow-up assignments. In those, the clients could indicate their need for a remote follow-up assignment as well as their need for an on-site follow-up assignment. Out of 30 clients, 24 clients expressed the need for a remote follow-up assignment (80%), whereas 19 out of 27 clients mentioned the need for an on-site follow-up assignment (70.4%).



For some clients, the remote assignment was an excellent solution in times where SEC experts are not able to travel to the country of the client for an on-site assignment, as it was the case during the COVID-19 pandemic. However, for their follow-up assignment they emphasized the need for the SEC expert to be on site to support them in the implementation and operationalization of strategies, business plans or for the training of staff.

#### Contact with SEC Expert often continues after end of remote assignment:

As far as the **SEC experts** are concerned, only one of the six SEC experts interviewed stated that there is already a follow-up mission with the client planned. Of the five SEC experts, who do not have a follow-up mission planned, three have stayed in contact with their clients and two would be interested in a follow-up assignment with the same client. Of those, one SEC expert specifically recommended a follow-up assignment in person.



### 3.3. Efficiency

The efficiency of the remote assignment for the SEC clients was assessed along the key guiding question:  
*Have the resources been used well and the planned outputs of the SEC remote assignments achieved?*

#### 3.3.1. Overall satisfaction of SEC clients

As illustrated in the graphs below, as well as in the subsequent table, in each of the categories, more than 93% of the 32 interviewed **clients** indicated a “good” or “excellent” satisfaction. With levels of satisfaction “excellent” of 84.4% and 87.5% respectively, the clients were especially satisfied with the collaboration with the SEC expert as well as the technical expertise of the SEC expert. Whereas the clients were a little less satisfied with the communication methods used during the remote assignment. The next section therefore takes a closer look at the communication between the client and the SEC expert.



Client's Satisfaction regarding	Poor	Average	Good	Excellent
Content of the remote assignment	0.0%	6.3%	21.9%	71.9%
Structure of the remote assignment	0.0%	3.1%	31.3%	65.6%
Communication Methods	0.0%	0.0%	46.9%	53.1%
Technical Expertise of Expert	0.0%	3.1%	9.4%	87.5%
Coaching Capacity of Expert	0.0%	3.1%	25.0%	71.9%
Collaboration with Expert	0.0%	3.1%	12.5%	84.4%

The main reasons for the **high level of satisfaction** stated by the SEC clients include:

- There was time available to prepare the virtual meetings with the SEC expert beforehand resulting in highly productive virtual meetings with the SEC expert.
- The professionalism and extensive experience of the SEC expert in the client's field.
- The excellent communication skills and motivating/ encouraging capacity of the SEC expert.
- The SEC expert's capacity to focus and structure the remote assignment in view of the objective.
- The SEC expert's understanding of the needs and context of the client.
- The high motivation, flexibility, as well as availability of the SEC expert to provide support.

The main reasons for a **lower level of satisfaction** stated by the SEC clients include:

- The SEC experts lack of expertise in the client's specific domain.
- The lack of suitable technical tools limited the topics of the remote assignment.
- The SEC expert's lack of understanding of the client's context and needs
- The lack of time commitment from the client's side

The applied *Net Promoter Score (NPS)*<sup>9</sup> that measure customer experience by assessing the clients' likelihood on scale from 1 to 10 whether they would recommend a remote assignment to their peers confirms the satisfaction. 78.1% of the interviewed SEC clients gave a score of 9 and above stating as main reasons:

- The achievement of their objectives and thus the fulfilment of their needs.
- The access to specialised expertise from the SEC experts was highly valued.
- An improvement of their (business) activities was directly noted.
- The communication with the expert went well.
- Affordability of expertise/ consultancy for clients with limited resources.

The one client who scored below 7 (score of 6) mentioned the high time commitment that remote assignments require to be successful. However, it should also be noted that the interviewee who gave the score was not the main contact person of the SEC expert. Subtracting the percentage of people with a score below 7 (3.1%) from the percentage with a score of 9 and above (78.1%) results in a high NPS of 75%.

### **Encouragement and motivation as additional factor for satisfaction**

Besides the technical and thematic expertise, some clients further mentioned the emotional support that they received from the SEC expert in form of encouragement and motivation to continue with their activities despite their situation of crisis. For two clients (one SME in Peru and one SME in Tunisia) the exchange with the SEC expert was also a confirmation for them that they were “on the right track” with their strategy and approach.

*« (...) nous pouvons dire déjà que notre vision est plus claire, que nous sommes encore plus motivés que nous ne l'étions et que nous sommes confortés quant à la justesse de notre approche et nos idées initiales, surtout quand un expert vous le confirme : ça ne peut que vous rassurer et vous motiver. »* (SME from Tunisia)<sup>10</sup>

### **Areas of improvement for SEC clients**

When asked about areas of improvement regarding the remote assignments, a third of the 32 interviewed clients (11) had no concrete suggestions for improvement. Other clients mentioned the following areas of improvement:

- SMEs in Nepal, Cambodia and Bolivia mentioned the importance of a thorough preparation of the content of a remote assignment. For instance, for the identification of the topics and the content of remote assignments, an in-depth analysis of the needs and problems of the clients should be done (SME in Nepal and in Bolivia).
- In addition, it was also stressed that the client him-/herself should be well-prepared for the topics of the remote assignment to ensure an optimal efficiency of the assignment (SME in Cambodia).
- In the case of trainings, one client in Benin recommended to agree on the methodology and the content of the training with the expert beforehand. Since for the expert it is not easy to detect possible differences in knowledge and skills among the participants from a distance.

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<sup>9</sup> The Net Promoter Score (NPS) was developed by [Satmetrix Systems, Inc., Bain & Company und Fred Reichheld](#).

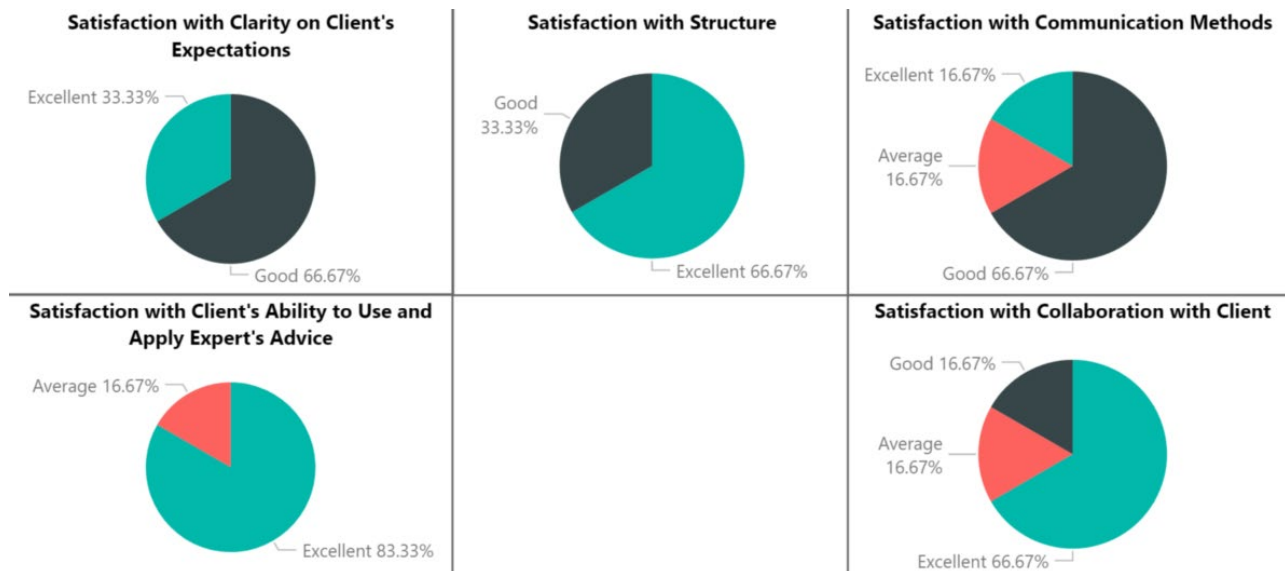
Following the logic of the NPS, the clients that gave a score of 9 and above are considered as “promoters” indicating their satisfaction with the remote assignments. Clients who gave a score of 6 and below are considered as “detractors” indicating their non-satisfaction with the remote assignment. Those clients scoring 7 or 8 are considered as “indifferent” regarding the satisfaction with the remote assignments. The final Net Promoter Score is then calculated by the deducting the “detractors” from the “promoters” whereby a NPS of above 30% is considered as high.

<sup>10</sup> Translation of quote: “(...) we can already say that our vision is clearer, that we are even more motivated than we were and that we are comforted by the accuracy of our approach and our initial ideas, especially when an expert confirms this to you: it can only reassure and motivate you.”

Similar to the findings on relevance above, these suggestions are focused on good planning, preparation and expectation management as key factors for success.

### 3.3.2. Overall satisfaction of SEC Experts

The overall satisfaction of the six SEC experts interviewed, as illustrated in the graphs below, is comparably high to the one of the clients, with at least 83.3% of the SEC Expert indicating a “good” or “excellent” level of satisfaction in each of the categories.



Expert's Satisfaction regarding	Poor	Average	Good	Excellent
Clarity of Client's Expectations	0.0%	0.0%	66.7%	33.3%
Structure of the remote assignment	0.0%	0.0%	33.3%	66.7%
Communication Methods	0.0%	16.7%	66.7%	16.7%
Client's Ability to Use and Apply Expert's Advice	0.0%	16.7%	0.0%	83.3%
Collaboration with Client	0.0%	16.7%	16.7%	66.7%

The main reasons for the **high level of satisfaction** stated by the SEC experts include:

- Realistic idea of what to expect from the assignment
- Support from SEC HO as well as SEC coordinator
- Responsiveness of the client to provide further information or answer questions
- Client's willingness to receive the expert's advice
- Trustful working atmosphere with client
- Transparency of the client regarding needs and problems
- Sharing of also non-work-related topics, personal matters

The main reasons for a **lower level of satisfaction** stated by the SEC experts include:

- Continuous need to manage client's expectations and to clarify mandate of the assignment
- Issues with internet connections
- Unreliability/ noncommitment of the client<sup>11</sup>
- Client withheld information from the SEC experts

<sup>11</sup> The SEC Expert reported that with time the client committed less and less time to the remote assignment. The SEC Expert had the feeling that the client was too absorbed in the operations of the client's organization as well as that the client had simultaneously another remote assignment with another SEC Expert.

The high level of satisfaction is confirmed by the experts' interest in follow-up assignments. When asked how likely it would be on a scale from 0 to 10 (10 being highly likely) that the SEC Expert signed up for another remote assignment, five SEC experts (84%) responded with a score of 9 and above, one with a score of 8.

### Areas of improvement for SEC Experts

The SEC experts mentioned the following general areas of improvement for an overall increase in efficiency of the remote assignments:

- One SEC expert with an assignment in Bolivia mentioned **more time to prepare the assignment**. According to the SEC expert, two to four weeks preparation time would be ideal before launching the assignment. Another SEC Expert, on the other hand, stated to prepare less the next time and to “wait and see” what will come up during the assignment.
- One expert mentioned that the weekly reports they had to submit to the SEC HO were time consuming and it would have been preferable to have **more freedom concerning the progress reports**.
- More **exchange among SEC experts** who are on a remote assignment. One SEC expert with multiple assignments in Uganda and Bolivia explained that during the presentation of a fish farm project of another SEC assignment missing aspects were noted. The SEC expert thus suggests such an exchange would facilitate the discussion on cross-thematic topics and would further increase the quality and efficient implementation of the consultancy services of the experts.
- The **marketing potential of the SEC assignment** was addressed by an SEC expert with an assignment in Nicaragua. From the expert's experience, advice from international experts can attract new customers, which in turn has a positive impact on the client. The SEC expert therefore suggests that clients publicly show that they have been counselled by SEC experts – as it is common with other international advisory services.

#### 3.3.3. Communication tools, channels and formats

Given the virtual nature of the assignments, the quality of communication and exchange, and thus the efficient implementation of the SEC remote assignment, is highly related to technical tools, channels and formats used. Working across time zones and differences of native language present additional challenges.

#### Zoom and Skype major tools for virtual meetings

For the virtual meetings with the SEC experts, the clients mostly mentioned using the video conferencing tools Zoom and Skype. One or two clients preferred Google Meet, since in the free version of Zoom the meeting time is limited to 40 minutes. The benefit of using video conferencing tools with a recording function such as Zoom was illustrated by a client in Nepal:

*«The good thing is that we have recorded all the meetings and we can always refer back to the recorded videos whenever we have any confusions.» (SME in Nepal)*

#### Email for formal communication and instant messengers for ad-hoc questions

Between the virtual meetings, the clients and the SEC expert were in frequent contact via email to share documents or more formal information. In case the clients or the SEC expert needed information urgently or had a quick question they resorted to instant messenger platforms such as WhatsApp. Only one client reported to have communicated with the SEC expert exclusively via email and only met virtually on Zoom for the progress meetings with the SEC coordinator. However, it should be noted that the interviewed person was not the main contact person of the SEC expert.

The SEC experts' reports regarding the communication tools used do not differ from those reported by the clients. Only one SEC expert stated that the communication with the client, who had little time, worked better via email than via phone or video calls as there was no need to find a date and time for an appointment.

### **Sharing of relevant documents prior to meeting**

As for the structuring of the exchange between the SEC client and expert, two clients (one SME from Uganda and one SME from Nepal) reported that for an efficient implementation of the remote assignment, relevant documents should be shared prior to the meeting to better focus on specific points and questions.

*«The content of the remote assignment was easy to access. It was always sent to the client's email a day before the meeting with the SEC Expert so that the client could read through it and understand better during the meeting. After the meeting, the client was given a day to generate some more research and questions on the meeting's topic. This further expanded the knowledge of the client of the given topics. In the next meeting the client was also given the opportunity to discuss with a presentation on their discoveries within the same topic.» (SME in Uganda)*

### **Videos of work environment for SEC experts**

In addition to the written and verbal exchanges, some clients also sent small videos to the SEC expert, which documented their daily work environment or showed the progress and results of implementing the SEC expert's advice. These helped the expert to gain a better understanding of the client's situation and challenges. The use of videos in the scope of practical demonstrations was also mentioned by a client in Uganda who recommended using multiple video cameras to show the demonstration from different perspectives.

### **Little to no issues with language**

Regarding the language, the communication between the SEC clients and experts seemed to have worked well or very well in most cases. One client in Bolivia reported that the SEC expert was able to compensate for his lack of Spanish skills with a translator. Only one client (SME) in Nicaragua reported limitations due to the SEC expert's lack of language skills and another client, also SME from Nicaragua, mentioned the importance of strategies to reduce the language barriers in remote assignments.

### **Internet connection issues of limited influence**

Although issues with the internet connection were mentioned by several clients, most of them did not think this impaired the efficiency of the remote assignment. Of the 32 clients interviewed, only seven clients, two clients each from Nepal and Uganda, as well as one client each from Cambodia, Bolivia, and Nicaragua, reported such difficulties with the internet connection, to the extent that some planned meetings with the SEC expert could not take place.

### **Time difference challenging but also used as an advantage**

Another challenge for the communication with the SEC expert, mentioned by the two clients (one in Guatemala and one in Nicaragua), was the time difference between them and the SEC expert. This made it difficult to schedule a time for virtual meetings that suited both parties.

*«Consideran que el mayor problema se dio con los horarios, ya que son alrededor de 8 horas de diferencia y a veces costaba un poco el ponerse de acuerdo ya que cuando el experto tenía mayor disponibilidad el cliente estaba a media jornada laboral.» (SME in Guatemala)<sup>12</sup>*

In the interviews with the SEC experts, the time difference was sometimes regarded as positive. One SEC Expert explained that the time difference was used to advantage in the remote assignment as the

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<sup>12</sup> Translation of quote: "They consider that the biggest problem was with the timetables, as they are about 8 hours apart and sometimes it was a bit difficult to reach an agreement, as when the expert was more available, the client was working half the day".

expert was able to send the documents to the client in the evening and the client still had enough time to prepare them before the next meeting. In contrast, another SEC expert warned that the time difference should not be underestimated and needs careful planning.

#### **3.3.4. Frequency and level of exchange**

Almost half of the clients interviewed (15 clients) reported to have had weekly virtual meetings with their SEC Expert with a duration of 1 to 3 hours per meeting. About a third (11 clients) mentioned to have had bi-weekly meetings or to have met more than twice per week with the SEC expert when the topics they worked on demanded more frequent contact. Using the communication tools mentioned above, such as email and instant messenger platforms, the clients and SEC experts were often in contact in between the "official" virtual meetings to send each other questions or further information.

##### **Enough time between trainings**

Two clients (one in Cambodia and one in Benin) explicitly mentioned that the frequency of contact with the SEC expert was too frequent for them, whereas one client (Nepal) wished to have a more frequent contact with the SEC expert. The client in Benin explained that for an online training course, twice a week for 1.5 hours was too frequent since the participants did not have enough time in between the trainings for preparatory as well as follow up work.

##### **Duration of virtual meetings limited**

As for the duration of the virtual meetings, it was mentioned by one client in Bolivia, that a duration of a video conference of more than 1.5 hours would have been too tiring. The client considered that if the assignment were an on-site assignment, they would have been able to meet longer with the SEC Expert.

##### **Regular contact important**

In the interviews with the SEC experts, it was widely noted that regular contact was well appreciated among by SEC experts. In cases where the frequency was irregular, the SEC experts reported frustration. Some SEC experts also commented on the intensity: apart from the regular phone and/or video calls and emails between the client and the SEC expert, the connection through instant messengers such as WhatsApp created the impression that the SEC expert was available 24/7 to the client.

##### **Participants of remote assignments mainly management staff**

Regarding the type of participants, it can be noted that in more than two thirds of the remote assignments (23) only management staff (or the owners) participated in the virtual meetings with the SEC expert. Only 8 clients mentioned including both management and operational staff in the exchanges with the SEC expert. Some clients, where only management staff participated in the meetings, justified the exclusion of the operational staff by the time difference between Switzerland and the client's country (in this case Guatemala). The SME from Guatemala explained that if the expert had been on site, more people from the company could have participated. Since the meetings with the SEC expert were always held at 6 a.m. local time, the client could not expect their employees to participate. Another client (SME from Nicaragua) reported that the lack of English language skills prevented their staff of participating in the exchange with the SEC expert who lacked Spanish language skills. In other cases, some clients, such as one SME in Peru, stated that the topic of the remote assignment did not require operational staff to participate in the meetings with the SEC Expert.

##### **Remote consultancy reduces SEC Expert's flexibility in choosing their counterparts**

Regarding the SEC expert's counterparts (the person with whom the SEC expert works most often), one SEC expert with an assignment in Cambodia was surprised about the primary contact person and convinced that in an on-site assignment, it would have been easier to "steer" the choice of primary contact person.

### Buy-in of management important

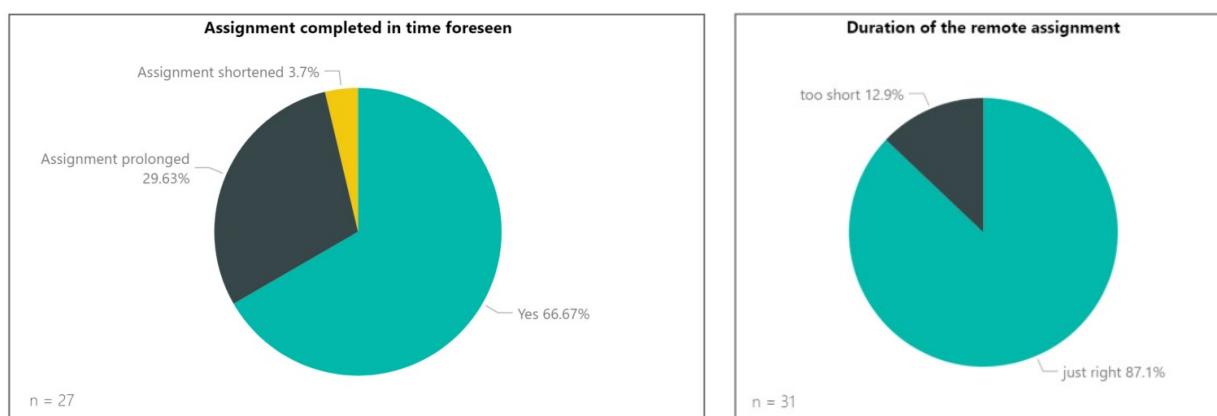
Another SEC expert with an assignment in Bolivia made sure that the primary contact person presented what had been discussed (especially regarding strategy), as well as the concepts elaborated, to the owners of the SME in order for them to regularly approve the outputs of the assignment. This way, the SEC expert ensured that the results did not remain at the employee level, but also had the commitment of the management.

### Operational knowledge of the SEC Expert's counterpart important

In general, as a SEC expert with an assignment in Nicaragua explained, for the exchanges with the expert to be fruitful it is important that the primary contact person knows the operational aspects of the business (work procedures, processes, employees, etc.) well. This does not necessarily mean that the person is fully involved in the operational business, but she/he must be very knowledgeable about it.

#### 3.3.5. Duration of the remote assignment

Of the 32 clients interviewed, 27 or 31 clients respectively commented on the duration of the remote assignments. As illustrated in the graphs below, 18 clients (66.67%) mentioned that they completed their remote assignment in the foreseen time and 8 clients (29.63%) reported that their assignment was prolonged. One client (3.7%) explained that the assignment was shortened since all the objectives of the assignment were achieved. The data from the clients' final report shows that 27 clients (87.1%) perceived the duration of the remote assignment as just right, whereas a minority of 4 clients wished the duration of the remote assignment had been longer.



### Remote assignment to be extended into “implementation phase”

As for the reasons, why the duration of the remote assignments was perceived by some clients as too short, this was mainly due to the fact, that the client was not able to address all the topics with the SEC expert. Moreover, a client in Peru explained that it would have been good to prolong the assignment in order to receive support and advice from the SEC expert when actually applying the new skills in practice:

*«The time has been a little short. Perhaps one or two more months would have been very good, to develop the practice (the application), which is where some problems arise, and to be able to consult directly with the SEC Expert. The pandemic has also made it difficult for me, as a consultant, to travel more frequently to visit the plants and support them more in the practical application. Perhaps if the mission was only done with my group of plants (9 out of 16) it would have been possible to make more progress.» (NGO from Peru)*

The point of accompanying the client also during the implementation of the outputs of a remote assignment was also raised by an SEC expert who feels it is important that the client is not simply “dropped” at the end of



an assignment. The expert suggests including the implementing phase in a remote assignment in order to provide continuous support to the client during the implementation of the advice of the remote assignment.

### **Duration depending on the nature of the topics**

In the interviews with the SEC experts, one expert stated that the ideal duration of an assignment depends on the type of the assignment. For instance, the expert considered two months for the elaboration of a fundraising or marketing concept as too long since for the expert it usually takes one week to complete such an assignment.

### **3.3.6. Advantages and shortcomings compared to on-site assignments**

#### **Flexibility, low costs and more time for in-depth discussions**

As for aspects that worked better in remote assignments, a small minority of clients observed the advantage of having more time available for in-depth discussions, to process the information provided and to deepen the topics between the meetings with the expert. Another positive aspect mentioned was that the remote assignments allowed for more flexibility for the participants since they could work in their own time and did not have to travel to the meetings with the expert. In addition, a few clients brought up the financial advantage of remote assignments over on-site assignments.

*«En estos momentos que vivimos la asesoría a distancia es una gran oportunidad sobre todo porque no se tiene que incurrir en costos (...).» (SME in Nicaragua)<sup>13</sup>*

The advantage that remote assignments do not come at a cost for the clients was also highlighted by several SEC experts. One SEC expert with multiple assignments in Uganda and in Bolivia stated that the Ugandan clients would not have been able to afford an international expert on site and thus the remote assignment was a great opportunity for them to gain access to expert knowledge. The possibility to flexibly plan the exchanges with the client, and also the fact that they were "able to turn off in the evening" were mentioned by the SEC experts as further advantages of a remote assignment. In one case, the remote assignment had to be put on hold for two to three weeks due to changes in the legal building requirements. The SEC expert was thus happy not to have been on site and to have had to wait for the client to rewrite the project.

#### **Less efficient in identifying and understanding clients' needs and context**

The majority of interviewed clients, however, were of the opinion that on-site expert assignments are more efficient in terms of identifying and addressing the clients' needs and problems. Importantly, remote assignments are, according to the clients, limited in terms of the fact that the expert cannot comprehensively grasp and understand the circumstances on site, such as the socio-economic context, the clients' work processes, etc., through virtual exchange. This, in the eyes of many clients, is central to the success of an assignment.

*«For remote assignments, the expert may not have the picture/context in which businesses and people in Uganda operate and therefore the consultant may assume that what works in Switzerland works the same here. This may cause a misunderstanding between the client and the expert during the assignment.» (SME in Uganda)*

*« Face-to-face consultancy might be better for the expert to realize and understand the real situation of the [client's] service and will be better [equipped] for [providing] (...) practical advices and guidance. » (SME in Mongolia)*

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<sup>13</sup> Translation of quote: "In these times we live in, distance consultancy is a great opportunity, especially because you don't have to incur costs (...)."



### Limited number of participants

In addition, clients mentioned that if the expert had been on site, the number of participants could have been enlarged and the expert would have been able to exchange and work also with operational staff members – instead of mainly only with management staff. This would have been beneficial for the clarification of questions and provision of further information from both sides – the participants as well as the expert. In addition, some clients felt that they could have worked in a more detailed way and on more topics with the expert in an on-site assignment.

*« Une mission en personne, surtout quand il s'agit d'une formation, est, en ce qui concerne la méthodologie et la didactique, préférable sur place puisqu'il y a le contact direct avec les apprenants. Il est plus facile de réagir directement à des questions, d'expliquer plus en détail des aspects complexes. » (SME in Benin)<sup>14</sup>*

*«Whereas, if [the Expert] would have been on site (...), almost, all the school staff would have participated and directly benefitted (...).» (SME in Nepal)*

*«Lo presencial hubiese facilitado, hubiese sido mas rápido ya que el experto al estar aquí hubiese identificado las cosas más rápido, la documentación hubiese sido mas rápido y nos hubiéramos podido concentrar en otros aspectos.» (SME, Guatemala)<sup>15</sup>*

### Lack of feeling for the client's capacity to understand content

The missing “feeling” for the country, the culture and the people was also mentioned by SEC experts during the interviews. More than one SEC expert felt that it was hard to see “where you are at”, whether the client understood the expert's advice or not or whether it was rather a question of not wanting to understand or demotivation.

### Limited ways of communication

One SEC expert with an assignment in Bolivia explained that in an on-site assignment the communication with the client is different. Being on site comes with the advantage that there are many ways of communication and the interpretation of subtle signs from the counterparts is much easier compared to a remote assignment where the expert can rely only on video or – in worse cases – only on audio communication. To compensate for the reduced quality of communication in remote assignments, the expert actively initiated conversations with the client about personal matters and took an interest in the client's environment. This contributed significantly to gaining the client's trust and helped to establish a good working relationship. Despite this compensation, however, according to the expert, one would never achieve the same closeness to the client as with an on-site assignment.

### Limited means of verification of information

An additional limitation mentioned by the SEC experts was that in a remote assignment the SEC expert is dependent on the information the client decides to share with the expert. While in an on-site assignment the SEC expert always has multiple sources of information and is thus able to detect problems, missing aspects or potential for improvement much easier, in a remote assignment the sources of information are limited to the participants of the remote assignments.

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<sup>14</sup> Translation of quote from SME in Benin: “A face-to-face assignment, especially when it is a training course, is, as far as methodology and didactics are concerned, preferable on-site since there is direct contact with the learners. It is easier to react directly to questions, to explain complex aspects in more detail.”

<sup>15</sup> Translation of quote from SME in Guatemala: “It would have been quicker because the expert being here would have identified things faster, the documentation would have been quicker and we would have been able to concentrate on other aspects.”

### Lack of commitment from the client

This holds true also for the willingness of the client to commit to the assignment. The geographical distance between the SEC expert and the client makes it easy for the client to withdraw from the assignment, as one SEC expert with an assignment in Nicaragua explained. In comparison, in an on-site assignment, where the client covers the SEC expert's expenses such as the flight and the accommodation there is a certain pressure on the client to profit from the expert's consultancy to the maximum. Whereas this pressure does not exist in remote assignments which do not cause additional costs for the clients.

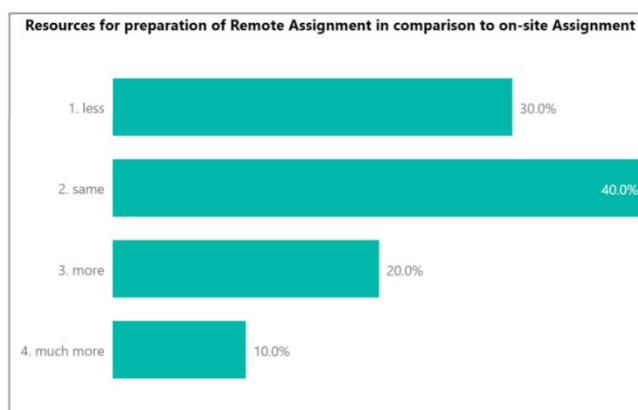
#### 3.3.7. Coordination of the remote assignments

In order to evaluate the coordination effort of remote assignments compared to on-site assignments in terms of human and financial resources, the SEC coordinators have been requested to fill an on-line questionnaire.

#### Preparation of remote assignments

In the online survey, four out of ten SEC coordinators reported that in comparison with on-site assignments, the preparation of remote assignments requires the same amount of resources. Three coordinators mentioned needing less resources and three stated that it takes more (2), or even much more (1) resources to prepare the remote assignments.

Those coordinators who need fewer resources justify this by the fact that the entire organization of logistics such as travel to and from the country, transport within the country and accommodation of the SEC expert falls away and that the process is more streamlined. Whereas those coordinators who need more or much more resources explain this with taking more time to introducing the program to the client, verifying the company information and assessing their commitment. In on-site assignments this could all be done in a visit to the clients and in face-to-face meetings which are seen as more efficient.



#### Aspects that **worked better in the preparation** of remote assignments compared to on-site assignments:

- Increased contact with the client
- The client is more responsive in the communication with the SEC coordinator
- Preparation of meetings is easier as they follow a set agenda
- No logistical organization needed

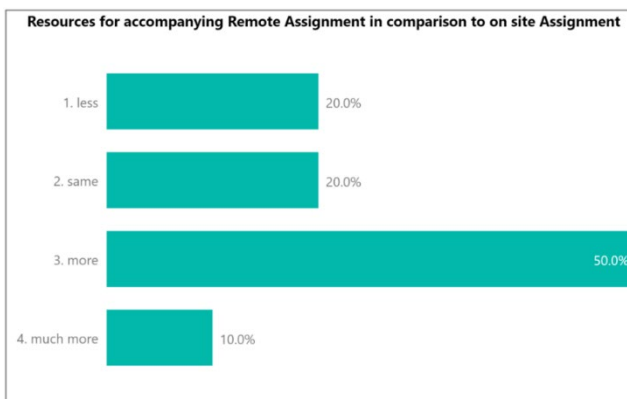
#### Aspects that were **more challenging in the preparation** of remote assignments:

- Verification of information about the client is more difficult
- Need to carefully evaluate the client's commitment
- Additional efforts needed to explain value and the modalities of remote assignments to the clients
- Lack of good internet connection
- Additional efforts needed to make use of new tools and processes
- Finding experts who speak the clients' language and are willing to waive the opportunity to visit the country

### Accompanying of remote assignment

In comparison to the on-site assignments, six out of ten SEC coordinators reported that they needed more resources to accompany remote assignments. Two coordinators each mentioned they would need the same amount or less resources.

As a reason for the need of more resources, SEC coordinators stated that their presence is required more often. There are more progress meetings with the clients and the SEC coordinators than in on-site assignments and generally the durations of the remote assignments are longer. Also, it was noted that the online meetings need prior capacity-building of the client to facilitate the use of online communication methods. In addition, the coordinators stated that their involvement has increased due to the need to follow up more closely after the meetings between the client and the SEC experts have taken place. The two coordinators who said it would take them less time to accompany a remote assignment than an on-site assignment, explained this by saving time due to the reduced frequency of in person visits to evaluate the SEC experts' work as well as due to the fact that online meetings can be arranged more flexibly than in person meetings.



#### Aspects that **worked better in accompanying** remote assignments compared to on-site assignments:

- The progress of the assignment can be monitored more closely due to the more frequent meetings
- Time management and record keeping
- Responsiveness of the clients in the communication with the SEC coordinator
- SEC coordinator and SEC HO are more involved in the content of the assignment
- No need for on-site visits of the client
- Meetings can be arranged more flexibly

#### Aspects that were **more challenging in accompanying** remote assignments:

- Quality of communication in the bilateral meetings between client and SEC expert difficult to verify
- Facilitating the development of trust between client and SEC expert
- Not being able to monitor the assignment on site
- Delay in progress of assignment as problems could only be addressed and solved in the weekly meetings
- Limited time for meetings available per week
- Unreliability of clients to adhere to scheduled meetings or deadlines
- Clients' capacities and skills to use online communication methods to meet virtually
- Lack of good internet connection
- Language difficulties in online meetings
- Time difference between client/ SEC coordinator and SEC expert

### Reduction of frequency of progress meetings and simplification of progress assessment needed

As for suggestions for improvements for the accompanying of remote assignments, several SEC coordinators stated that there is room for improvement to render the progress meetings more efficient. Two coordinators suggested to organize the progress meetings less frequently, whereas one coordinator proposed to organize progress meetings only when there is an issue at hand that needs to be solved and highlighted that the assessment of the progress could also be done via phone call or instant messenger as in on-site assignments.

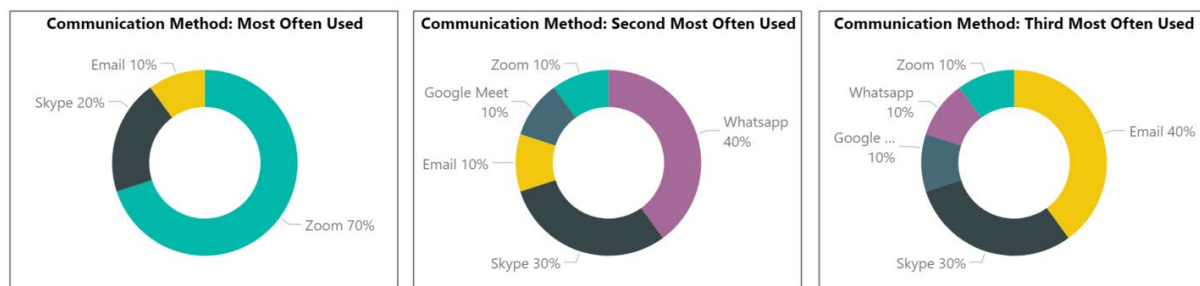
Another point that was raised by a SEC coordinator concerns the shared responsibility between SEC coordinator and SEC HO in following up with the client and the SEC expert. It was suggested to split these responsibilities with the coordinator following up with the client and SEC HO following up with the SEC expert.

In addition, a coordinator stated that there is improvement needed in the clients' reliability to adhere to the scheduled meetings and proposed to impose rules on the clients.

### Communication methods most used in remote assignments

The online survey with the SEC coordinators showed that Zoom was the most used communication method by the SEC coordinators, followed by Skype and emails. In addition, Whatsapp and other instant messengers have been used frequently in communication between SEC clients and experts.

### Closure of the remote assignment



Most of the SEC coordinators felt that there is a main difference in the closing of a remote assignment and the closing of an on-site assignments: the lack of personal contact and debriefing. One SEC coordinator described that at the end of an assignment, the coordinator usually accompanied the SEC Expert to the airport and had a coffee with the expert to review the assignment: the impact of the assignment, the needs of the client, the recommendations, etc.

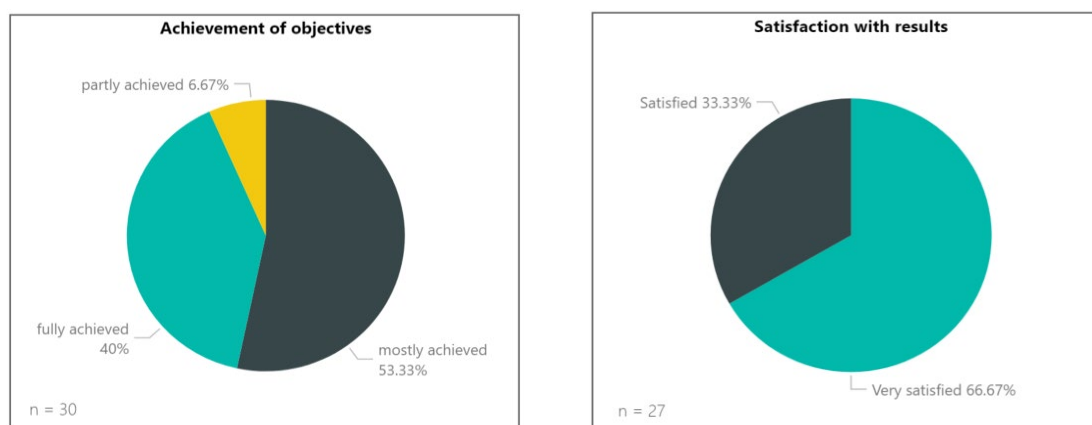
### 3.4. Effectiveness

*Does the SEC remote assignment contribute to the increased capacities and behaviour change of the client?*

The effectiveness of the remote assignments regarding the assignment outcomes and the clients' satisfaction was assessed. In addition, the clients were asked whether they observed an impact on the performance of their enterprise, organisation or institution.

#### Client's satisfaction with results of the remote assignment

The data from the clients' reports suggests that 28 of 30 clients (93.3%)<sup>16</sup> achieved the objectives of their remote assignments (cf. graph below). This is further supported by the in-depth interviews with the clients, where all 27 clients who gave information on their satisfaction were either very satisfied or satisfied with the outcome of their remote assignments.



When asked whether the remote assignment fulfilled the client's expectations and objectives, several clients, for example SMEs from Nepal, Bolivia and Guatemala, stated their expectations have even been exceeded. The reasons given were that they were able to address more topics with the SECexpert than they initially thought they would or that the SEC expert provided them with tools, methods and general advice on topics that came up during the remote assignment and deepened the clients understanding of his or her general business and management approach.

*«Sí y las excedio. El cliente no esperaba tener una contabilidad de mis gastos y ventas y lograron eso. No estaba en el formulario, además de cualquier estrategia que surgiera en el camino.» (SME, Guatemala)<sup>17</sup>*

#### Adjusting expectations

Other clients had to adjust their expectations of the remote assignment at the beginning or in the course of the remote consultancy. They described having discovered with the SEC expert that there were other problems which they were unaware of that had to be addressed first, or that their initial objectives exceeded the time they had available for the remote assignment.

*«At the beginning we expected a lot from the SEC [Expert]. But in reality, we found out with the [SEC] expert other priorities to deal with. The company also recognized the problem and [we are] satisfied with what we discussed and received. » (SME, Cambodia)*

<sup>16</sup> Data was missing for two clients.

<sup>17</sup> Translation of quote from SME in Guatemala: "Yes, and it exceeded them. The client didn't expect to have an accounting of my expenses and sales and they achieved that. It wasn't on the form, plus any strategies that came up along the way."

*«El objetivo inicial era muy grande para el tiempo que se tenía, por eso se replanteó el objetivo a lo que se podía alcanzar dado el tiempo y la situación (no se podían visitar las empresas debido a que muchas estaban trabajando a puertas cerradas o en modalidad en línea por el COVID). » (NGO, Bolivia)<sup>18</sup>*

### SEC Expert's satisfaction with results of the remote assignment

SEC experts' overall satisfaction with the remote assignment ranges from "more or less satisfied" to "very satisfied" based on the assignment reports. In the interviews several SEC experts stated that initially they did not have big expectations of the remote assignment but had rather a "let's wait and see" attitude.

SEC experts showed less satisfaction with the results when the set objective of the assignment was not fully achieved or if they felt they could have achieved more. In contrast, there were also those SEC experts who said that the achievements and results of an assignment – whether on site or remote – depend heavily on the motivation and level of commitment of the client. As an expert it is thus important to be able to draw a line at some point, even if (all) the results have not yet been achieved. For other SEC experts the satisfaction with the remote assignment was also connected to their personal benefits such as having been able to make use of their foreign language skills again or having met nice people.

### Increased performance

Due to lockdown and restrictions caused by the COVID-19 pandemic, not all clients were able to directly implement the outputs of the remote assignments and the advice from the SEC expert. In particular, clients in Nepal were still waiting to take up their activities again at the time of the in-depth interview.

For other clients, it was simply too early for them to observe changes in the performance of their business, organization, or institution. Those clients who did notice a positive influence of the remote assignment on their performance mentioned the following changes:

- **Improved HR management: increased employee retention and decreased staff turn-over** (1 client in Nicaragua, SME):  
*«Por el lado de la empresa la forma de crear la importancia en la empresa de poner estrategias para evitar la rotación del personal, (...). Los procesos para evitar la rotación de personal fueron implementados. Con el personal de ventas era con quienes teníamos mayores problemas de rotación y logramos con el apoyo del experto crear procedimientos o manual de entrenamiento para que ellos se sintieran mas empoderados desde el primer día que comenzaron a trabajar.» (SME, Nicaragua)<sup>19</sup>*
- **Rendering existing processes more efficient** (7 clients: Nepal, Mongolia Bolivia (2), Guatemala, Nicaragua (2), all SMEs):  
*«(...) gracias a las recomendaciones del experto nuestra forma de trabajo ha cambiado, ahora es más vertical, todos participamos en un dialogo fluido y dinámico. Planteamos objetivos y metas de manera sencilla, para que todo el personal pueda entenderlos fácilmente.» (SME, Bolivia)<sup>20</sup>*
- **Improvement of quality of existing products** (1 client in Bolivia, SME):

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<sup>18</sup> Translation of quote from NGO in Bolivia: "The initial target was too big for the time available, so the target was redefined to what could be achieved given the time and the situation (it was not possible to visit the companies because many were working behind closed doors or in online mode by COVID)."

<sup>19</sup> Translation of quote from SME in Nicaragua: "On the company's side the way to create the importance in the company to put strategies to avoid staff turnover. Processes to avoid staff turnover were implemented. With the sales staff we had the biggest turnover problems and we managed with the support of the expert to create procedures or training manuals so that they felt more empowered from the first day they started working."

<sup>20</sup> Translation of quote from SME in Bolivia: "Thanks to the expert's recommendations, our way of working has changed, it is now more vertical, we all participate in a fluid and dynamic dialogue. We set objectives and goals in a simple way, so that all the staff can easily understand them."

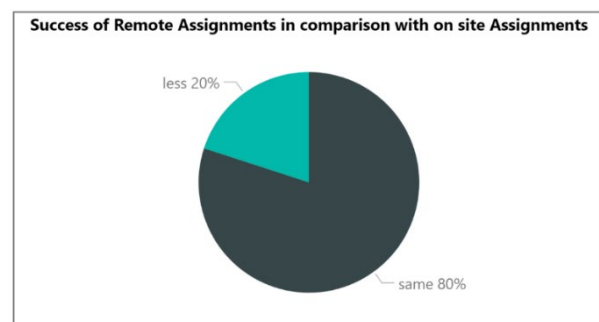
*«Las técnicas aprendidas ya están siendo aplicadas, ahora tienen los mismos productos pero todos de mejor calidad y a menor costo de producción.» (SME, Bolivia)<sup>21</sup>*

- **Product diversification/ new products** (2 clients in Uganda, 1 client in Nicaragua, 1 client in Bolivia, all SMEs):  
*«New designs have been developed for clients which increased customers and sales, the labels for the enterprises have also attracted many customers to the business.» (SME, Uganda)*
- **Diversification of distribution channels** (1 client in Nicaragua, SME):  
*«He cambiado mis tácticas , para seguir impulsando los aderezos, quiero continuar con mis aderezos para eso necesito vender mis productos en diferentes canales de distribución.» (SME, Nicaragua)<sup>22</sup>*

Most of the SEC experts were confident that the clients had enough intrinsic motivation to continue implementing the results of the remote assignments. Yet, there were more reservations about whether the clients also had the capacity to do so. Two SEC experts mentioned that the clients' lack of time could impair the implementation of the results of the remote assignment. Another SEC expert felt that the client would still need external support for the implementation phase.

### Success factors

Eight out of ten SEC coordinators stated that remote assignments can be as successful as on-site assignments. Two felt that remote assignments were less successful. Yet, none of the SEC coordinators considered remote assignments to be more successful than on-site assignments. Those SEC coordinators who stated that remote assignments are as successful as on-site assignments added, however, that this was only the case if the client and the SEC expert get along and communicate well and have a common understanding of the content and objectives of the assignment. Furthermore, the topic plays a major role: assignments on management support for example for corporate strategies, marketing or human resources work well as remote assignments. Yet, assignments on improvement technical skills require the SEC expert to be on site.



Further success factors mentioned by the SEC coordinators are:

- Suitable methods and tools, including a good internet connection, to transfer knowledge remotely
- Expectation management and clarity on the role of SEC expert
- Clients' commitment to share information and to implement tasks agreed with the SEC expert

On the other hand, the two SEC coordinators, who believe that remote assignments are generally less successful than on-site assignments, explained this by the fact that in remote assignments the SEC expert cannot get to know and observe the realities of the client – the exchange of photos and videos cannot capture the work environment or the cultural context of the client.

### Management is more committed in remote assignments

One SEC coordinator stated that in on-site assignments the client's management team often delegates the work with the SEC expert to their employees. Whereas in a remote assignment, the commitment of the management is higher as it is mainly they who participate in the meetings with the SEC expert. In addition,

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<sup>21</sup> Translation of quote from SME in Bolivia: "The techniques learned are already being applied, they now have the same products but all of better quality and at a lower production cost."

<sup>22</sup> Translation of quote from SME in Nicaragua: "I have changed my tactics, to keep pushing the dressings, I want to continue with my dressings for that I need to sell my products in different distribution channels."

another SEC coordinator mentioned that remote meetings with the SEC expert receive more attention and are less interrupted than those in on-site assignments.

### **Continuation of Remote Assignments recommended by SEC Coordinators**

When asked to indicate the likelihood that they would recommend SEC to continue with remote assignments on a scale of 0 to 10 (with 10 being highly likely): *six SEC coordinators gave a 10, two SEC coordinators gave a score of 8 and one gave a score of 3.*

Those scoring 8 and above explained that remote assignments are an ideal approach to ensure the continuation of SEC expert consultancies during times of travel restrictions due to the COVID-19 pandemic. In addition, they highlighted the increased access to expert consultancy for clients with little or no budget since remote assignments do not incur any costs for the client, for instance for travel and accommodation of the expert. One SEC coordinator also stated that with online consultancies it is possible for the SEC expert to do multiple assignments simultaneously. Two SEC coordinators thus proposed to leave the choice up to the clients whether they want an on-site or remote assignment.

Moreover, several SEC coordinators – including the one who scored a 3 in the likelihood to recommend continuation – suggested that remote assignments might be useful in the preparation of on-site assignments. Connecting the SEC expert with the client a few weeks or months prior to an on-site assignment can help to facilitate the understanding of the client's needs and context. In addition, topics of theoretical character could already be covered remotely in order to render the implementation in an on-site assignment more efficient.

## **3.5. Impact**

*Does the SEC remote assignment contribute to the strengthening of the resilience and retention of jobs in the COVID-19 crisis?*

When considering the impact of SEC remote assignments, their contribution to mitigating the effects of the COVID-19 crisis is considered in addition to the changes in terms of clients' turnover, profit, and number of employees. In addition, clients were asked to provide an outlook on how they believe their situation in terms of turnover, profit, and number of employees is going to develop.

### **Remote assignments contributed to crisis mitigation**

19 out of the 23 clients who mentioned to have been affected by the COVID-19 crisis stated that the remote assignment with the SEC expert did contribute to the mitigation of the effects of the crisis. Two clients did not make any statement regarding the contribution or non-contribution and two clients stated that the consultancy did not contribute to the mitigation of the crisis. As for the reasons, why the clients perceived the remote assignment as helpful during the COVID-19 crisis, they are mainly identical to the changes in performance mentioned above:

- SEC client's being prepared for (next) pandemic crisis: In addition to the changes in performance, some clients in Nepal, Mongolia and in Peru, reported to feel better prepared for the (next) pandemic crisis. Thanks to the remote assignment, they made optimal use of the time in which they were not able to pursue their business activities due to the restrictions imposed by the pandemic control measures, by addressing strategic questions or by investing in further education.

*«La cuarentena nos afectó mucho. Algunos productores tuvieron que deshacerse de los quesos frescos, leche, etc. que no pudieron vender. Entonces tomaron conciencia de la necesidad de hacer quesos maduros que tienen durabilidad y mayor precio de mercado. Ahora estamos preparados para hacer*



*queso maduro y, si se da la segunda ola, no vamos a ser afectados como antes que sólo hacíamos queso fresco que es de corta duración.» (NGO, Peru)<sup>23</sup>*

- SEC experts supported strategic decision making: SEC experts that worked with clients, who were affected by the COVID-19 crisis, stated that their remote consultancy did contribute to the mitigation of the client's situation. One SEC expert with an assignment in Nicaragua explained that the remote assignment has helped the client to take strategically better decisions regarding the business model of his restaurant. Another SEC expert with an assignment in Bolivia highlighted that even though the client would have made it through the crisis without the remote assignment, the tools provided in the remote assignment helped (and will continue to help) the client to deal with the situation more confidently.

### **Stabilisation and gradual increase of turn-over:**

While seven clients (1 SME each from Cambodia, Mongolia, Tunisia and Guatemala, 2 SMEs from Bolivia and 1 NGO from Peru) stated it was too early for them to observe any changes on the level of turnover, profit or number of employees, another seven clients (all SMEs from Nepal) reported no changes regarding turnover or profit. In contrast, twelve clients in Nepal (1 NGO), in Uganda (3 SMEs), in Cambodia (1 SME), Bolivia (1 Association, 1 SME and 1 NGO) and Nicaragua (4 SMEs) seem to have successfully overcome the initial economic hit of COVID-19 and are recording turnover and profit increases again.

### **Retention of jobs:**

Regarding the number of employees, only one client (1 SME in Nepal) reported having had to reduce additional jobs since the beginning of the remote assignment to reduce the fixed costs of his SME because, by the time of the interview, the SME was still unable to resume its economic activities due to the measures taken against COVID-19.

Seven clients from Bolivia (2 SMEs), from Nicaragua (1 SME), and from Nepal (4 SMEs) did not record any changes in the number of employees. In the case of Nepal, this was due to the fact that the SMEs were still in lockdown and had not been able to resume their activities yet. One of the SMEs in Bolivia explained that thanks to the SEC remote assignment, they were able to reduce the production costs and were thus able to retain the number of workplaces.

There have also been indications of rehiring the staff, that clients had to lay off in the course of the COVID-19 pandemic. This was reported by two SMEs in Nicaragua, which were able to rehire their employees:

*«A partir de Octubre se ha activado el flujo de visitantes. Eso me ha permitido incorporar al personal que se tuvo que retirar.» (SME, Nicaragua)<sup>24</sup>*

In addition, six clients from Peru (1 SME), Uganda (2 SME), as well as Bolivia (1 SME, 1 association, 1 NGO) reported to have created additional jobs. As for the reasons why the clients were able to hire new staff, they most often mentioned the increase of sales of their products (1 SME and 1 association in Bolivia, 1 SME in Uganda). In the case of one SME in Uganda, the client mentioned that this positive change was due to the new approach to business management which was worked out with the SEC expert during the remote assignment. The Bolivian NGO explained that they were able to employ new staff due to the new projects that they were able to launch thanks to the remote consultancy from the SEC Expert.

### **Client's outlook and future plans**

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<sup>23</sup> Translation of quote from NGO in Peru: "The quarantine affected us a lot. Some producers had to get rid of fresh cheeses, milk, etc. that they could not sell. Then they became aware of the need to make mature cheeses that have a longer shelf life and a higher market price. Now we are prepared to make mature cheese and, if the second wave happens, we will not be affected like before, when we only made fresh cheese, which is short-lived."

<sup>24</sup> Translation of quote from SME in Nicaragua: "From October onwards, the flow of visitors has been activated. This has allowed me to bring back the staff who had to leave."

Most of the clients are optimistic that they will be successful in following their overall strategy and initial goal. For most of them this means improvement of market position and expansion to new markets – mainly tapping into export markets (2 SMEs in Nepal, 1 SME in Nepal, 2 SME in Bolivia). Other clients simply mentioned the expansion of their business and opening of new branches, increase in productivity or development of new products (2 SMEs in Uganda, 1 SME in Tunisia, 1 SME and 1 Association in Bolivia, 2 SMEs in Guatemala, 2 SMEs in Nicaragua, 1 NGO in Peru).

A few clients (5 from Mongolia, Cambodia, Bolivia, Nicaragua and Peru) plan to focus on the further improvement of their processes, strategies and planning. This is either because they are not yet able to take up business activities again or because their problems are not yet fully resolved.

Two clients (1 in Bolivia and 1 in Nicaragua) stated that they will resume their normal business activities as soon as the COVID-19 pandemic is over. Four clients (3 from Nepal and 1 from Bolivia) emphasized the need to diversify their services and products, or to develop new sources of income respectively, in the future as they expect their primary market to have changed permanently.

## 4. CONCLUSIONS AND RECOMMENDATIONS

### 4.1 Relevance of SEC Remote Assignments

*Do the SEC remote assignments meet the needs and requirements of the SEC clients?*

The remote assignments seem to have largely met clients' expectations and needs in terms of content and outputs. In some cases, the time frame was not sufficient to carry out all activities requested by the SEC client and objectives often became more clearly-defined after the first remote exchanges with the SEC expert. This requires in some case more detailed planning and some expectation management in the preparation stage.

Not all activities are suitable for remote assignments, specifically practical assignments such as demonstrations, activities related to practical implementation or dealing with operational problems. This limits the relevance of remote assignments for SEC clients as not all needs can be addressed in the same way as in on-site assignments.

The majority of clients declared an interest in and need for a follow-up assignment, which indicates their satisfaction with the remote assignments, also in as much as it is a solution in times of travel restrictions. However, for their follow-up assignment SEC clients emphasized again the need for practical on-site support.

#### **Key recommendations for future remote assignments:**

- Expectation management: Introduce preliminary exchanges between SEC clients and experts for detailed and realistic planning of the remote assignment regarding activities and output possible within a given timeframe
- Clarify beforehand which of the SEC client needs can be effectively addressed in a remote assignment and what support is better suited for an on-site assignment.
- Explore the potential of a "hybrid-model" for new or follow-up assignment combining remote support with a shorter on-site assignment when travel restrictions have been eased.

### 4.2. Efficiency of SEC Remote Assignment

*Have the resources been used well and the planned outputs of the SEC remote assignments achieved?*

#### **High overall satisfaction with the remote assignments**

SEC clients show a high overall satisfaction with 93% of the interviewed clients rating the implementation of the remote assignments as good or excellent in terms of content, structure, technical expertise and coaching capacity of the expert as well as collaboration with the expert. Communication methods received a slightly lower satisfaction rate.

The professionalism, expertise, motivation and flexibility of the SEC expert were stated by the SEC clients as the key reasons for the satisfaction. This indicates that the identification of a suitable SEC expert for assignment is key for an efficient remote assignment. Lower satisfaction rates were explained with a lack of context understanding of the SEC expert, which is difficult to overcome in a remote assignment.

According to several SEC clients, a major and often underestimated soft factor that contributed to the efficient implementation of the remote assignment was the encouragement and motivation by SEC expert in times of crisis.

Also the SEC experts show a high overall satisfaction with 83.3% of the SEC experts rating the implementation of the remote assignments as "good" or "excellent" in terms of clarity on client's expectations, structure, collaboration with the client, clients ability to apply advice as well as communication methods. Similar to the SEC clients, communication methods received the lowest satisfaction rate.

Main reasons stated by the SEC experts for high levels of satisfaction include clients' openness and transparency regarding needs and problems and responsiveness to the experts' questions and inquiries. This is complemented by additional soft factors such as a trustful working atmosphere, clients' willingness to apply advice as well as sharing of non-work-related topics. The support of SEC HO and the SEC coordinator was also highly appreciated by the SEC experts.

This indicates that building a trustful relationship between the client and the expert that goes beyond pure transfer of technical knowledge is key for a successful implementation of the remote assignment. Thus, SEC experts' lower levels of satisfaction were linked to clients' non-commitment, lack of transparency and expectation management. Other challenging aspects mentioned by the SEC experts included the internet connection and burdensome weekly reports.

#### General recommendations for future remote assignments:

- Allow time in the preparation phase for SEC experts to improve their context knowledge and understanding of the clients' needs and requirements
- Focus on "relationship building" during this preparation phase to strengthen mutual trust and understanding between SEC expert and client, e.g. through informal virtual "coffee talk" meetings.
- Explore the use of alternative communication methods and/or technical tools to increase efficiency of the remote assignment, i.e. augmented reality apps, co-creation software's, etc.
- Review reporting mechanisms for SEC experts to increase efficiency, e.g. via weekly verbal updates and a written mid-term and end-report.
- Create a virtual space for exchange among SEC experts currently on a remote assignment so they can share experiences and discuss cross-related topics specifically in cases of parallel assignments with the same client (e.g. in a "world café" format)

#### **Communication tools and formats**

The major tools in use for remote assignment include Zoom and Skype for virtual meetings but also messenger services such as WhatsApp for ad-hoc exchange and phone calls as well as email for sharing of formal information and documents.

The recording of virtual meetings has been beneficial for SEC clients, who are able to re-play the session. The use of instant messaging is useful for addressing ad-hoc questions. Email has also been relevant in terms of exchanging documents (also prior to meetings for preparation) and to overcome difficulties in finding time for an appointment. Additional formats such as videos of the work environment were used for an efficient implementation of the remote assignment.

The language barrier only played a limited role for the implementation of the remote assignment and was mostly mentioned in Latin America, where the challenges regarding the time difference were also highlighted. On the one hand, the time difference made it difficult to find a suitable time for meetings but on the other hand, it allowed for more time to review documents.

#### Recommendations regarding communication tools, channels and formats:

- Develop guidance on which tool is best used for which type of exchange format. This is to be individually applied for each assignment depending on needs and context (e.g. time difference)
- Advise SEC clients to record virtual meetings in order to be able to re-play the sessions and advise them to make short videos illustrating the work environment as well as how the expert's advice is put into practice

#### **Frequency and level of exchange**

Almost half of the clients had one weekly virtual meeting with the SEC experts with ad-hoc exchange in between using the different communication tools, which was just right for the majority of clients. It was

however mentioned that specifically in between training sessions, enough time should be planned for preparation and follow-up. Also SEC experts mentioned that regular contact with their clients is necessary and infrequent exchange can lead to frustration.

Virtual meetings are limited in time which limits in-depth exchange compared to on-site assignments. The instant messenger apps on the one hand allow for ad-hoc exchange, but on the other hand they can create the impression that SEC experts are available 24/7.

In two thirds of the remote assignments only management staff participated with the main reasons given being the time difference (meetings outside of business hours), or language skills, but also that the topic was not relevant for operational staff. SEC experts stated that they have less flexibility in choosing their counterparts compared to on-site assignments, also given that operational knowledge is often key for efficient implementation.

#### Recommendations regarding frequency and level of exchange:

- Provide standard guidance as to the frequency of meetings and ad-hoc exchanges, which can be adapted to the individual needs of the remote assignment.
- Manage expectations during preparation of the remote assignments to avoid that SEC expert is perceived as being available 24/7
- Include exchange platforms to pro-actively engage operational staff if relevant to the topic and seen as important by the SEC expert

#### **Duration of the remote assignment**

The majority of clients (87%) perceived the duration of the remote as just right. however, only two thirds completed the assignment in the foreseen time and 30% had to prolong it. SEC clients and experts mentioned the need for experts to accompany the process of actually implementing the experts' advice. Defining an ideal duration of a remote assignment seems to depend very much on the content and expected outputs.

#### Recommendations regarding duration of the remote assignment:

- Use the preparation phase to plan in detail a realistic duration of the remote assignment, taking into account the virtual nature as well as topic-specific requirements to avoid the need to prolong it at a later date
- When defining the duration of the assignment, include a certain degree of remote support during the actual implementation of the expert's advice ("*post-assignment support*")

#### **Overall advantages and shortcomings compared to on-site assignments**

A major benefit mentioned by SEC clients is that no costs are incurred by them, which allows SEC to offer remote assignment to a broader range of SMEs with limited financial means to co-finance on-site assignments. Further advantages are that remote assignments allow for better processing of information between meetings and allow flexibility in organizing meetings. This helps to deepen the understanding of the topics and to flexibly adapt the schedule according to the clients' progress or to take account of unforeseen events.

However, besides these advantages of remote assignments also several shortcomings compared to on-site assignments have been identified by SEC clients and experts. The shortcomings have partly already been already addressed above and include the difficulties in efficiently identifying and understanding client's needs and context, the limited number of participants, lack of feeling for the client's capacity to understand the content combined with limited means of verification, and a lack of commitment from the client. These shortcomings are highly linked to the missing social interaction compared to on-site assignments.

#### General recommendations:

- Promote remote assignments in the future to a broader range of Micro, Small and Medium Enterprises (MSMEs) as a cost-efficient alternative to (more effective) on-site assignments

- Make best use of the advantages and reduce shortcomings compared to on-site assignments through exploring a “hybrid”-model combining remote and on-site assignments, for example:
  - 1) First Part - Remote: Preparation, understanding of client and context as well as theoretical input/training
  - 2) Second part On-site: accompanying the application in practice
  - 3) Third part Remote: Follow-up and backstopping support

### **Coordination of Remote Assignments**

In order to evaluate the coordination effort of remote assignments compared to on-site assignments in terms of human and financial resources, SEC coordinators have been requested to fill an on-line questionnaire.

40% of SEC coordinator invest the same resources in preparing a remote assignment and 30% even less. This indicates efficiency gains mainly through lack of organizing logistics. However, at the same time workload has increased as due to movement restrictions, it took more time to verify information about the client, assess its commitment and explain/train on remote-working tools. This would have more efficient if personal visits to the client had been possible. These will be possible again as soon as local movement restrictions are lifted.

More than half of the coordinators stated that accompanying the remote assignment needed more or even much more resources compared to on-site assignments. This is mainly due to a higher frequency of progress meetings, the longer duration of remote assignments and intense follow-ups including guidance on the use of communication tools. However, the increased number of progress meetings also led to closer monitoring, and time management and record keeping improved. On the other hand, SEC coordinators confirmed that the development of trust between SEC client and expert is more difficult to facilitate remotely and that, SEC clients did not always adhere to scheduled meeting times or deadlines.

#### Recommendations for the coordination of remote assignments:

- Reduce the frequency of formal progress meetings to a kick-off, mid-term and final progress meeting complemented with ad-hoc progress meetings in case of an urgent issue to be solved
- Elaborate a set of “rules” for remote assignments for the client and expert including aspects such as adhering to deadlines and meeting schedules, providing information as requested, etc.
- Provide SEC coordinators with guidance material on the different communication tools that they can use to introduce them to unexperienced clients

### **4.3. Effectiveness of SEC Remote Assignment**

*Does the SEC remote assignment contribute to the increased capacities and behaviour change of the client?*

#### **High client’s satisfaction with the results achieved through remote assignments**

Two thirds of the clients reporting being highly satisfied and one third reported being satisfied with the achievements of the remote assignments. In several cases client’s expectations have even been exceeded. It is, however, important to be flexible and leave room to adjust the objectives of the assignment in case of unexpected problems. That way frustration about not achieving initially planned targets can be avoided.

#### **Still early but some performance increase observed**

For most interviewed clients it was still too early (or they were still under COVID-19 restrictions) to observe tangible changes in their business performance due to the remote assignments. However, some clients already observed positive effects such as improved HR management, more efficient processes, improved product quality, product diversification or diversified distribution channels. This is an early indication that remote assignments lead to a successful adoption of the SEC expert’s advice by the clients. This would need to be verified at a later stage.

#### **Success Factors**

Eighty percent of the interviewed SEC coordinators consider remote assignments to be as effective as on-site assignments with the remaining 20% stating that remote assignments are less effective. According to SEC

coordinators, the effectiveness of remote assignments depends strongly on the common understanding between SEC expert and client as well as the topic of the assignment. Softer topics such as corporate strategy, marketing or human resources are more suitable for remote assignments but technical skills training requires the expert to be on site for an effective assignment.

#### Recommendations on effectiveness of remote assignments:

- Remote assignments seem effective – thus SEC should continue offering remote assignments beyond COVID-19 as it allows clients with little to no budget access to expert input and allows SEC experts to carry out multiple assignments in parallel.
- Introduce a “mid-term assessment” of the remote assignment to evaluate if the planned objectives can still be achieved or need to be adjusted
- Identify topics where remote assignments are most effective and elaborate on a “hybrid”-model for topics that are more effective with an on-site component

#### **4.4. Impact of SEC Remote Assignment**

*Does the SEC remote assignment contribute to the strengthening of the resilience and retention of jobs in the COVID-19 crisis?*

Findings indicate that remote assignments have contributed to the resilience of the SEC clients with 19 out of 23 interviewed clients stating that support of SEC expert contributed to the mitigating of the effect of the COVID-19 crisis. Thanks to performance improvements clients report feeling better prepared for a future crisis.

Almost half of the interviewed SEC clients recorded increases turnover and profit combined with job retention (incl. rehiring) and even cases of job creation. For the other clients it was either too early to provide information on turnover, profit and jobs, or no changes have been observed. Directly linking this rather positive performance of SEC clients to the remote assignments is not possible as several other external factors influence this development, above all the general economic recovery that varies from country to country. However, following the theory of change at least some contribution to the impacts in terms of jobs and income can be assumed given that SEC clients attributed the improvement of their business performance to the adoption of the experts’ advice.

Despite the on-going crisis, most of the clients are optimistic that they will be successful in following their overall strategy regarding positioning and tapping into new markets. Several clients and SEC experts confirmed that the remote assignment contributed to the clients’ confidence to overcome the crisis successfully.

#### Recommendations on the impact of remote assignments:

- Include increased business resilience as an integral part and objective of each remote and on-site assignment in the light of recovery from the COVID-19 crisis (“*build back better*”) but also related to any unexpected future economic, social, or environmental shock that might affect the client’s business.

## 5. LITERATURE

International Labour Organization (January 2021): "[ILO Monitor: COVID-19 and the world of work. Seventh edition](#)"

International Monetary Fund (June 2020): "[World Economic Outlook Update June 2020](#)"

International Monetary Fund (October 2020): "[World Economic Outlook Update October 2020](#)"

UNDP (June 2020): "[Análisis de los efectos e impactos socioeconómicos COVID-19 en Guatemala](#)"

World Health Organization (November 2020): "[EPI-WIN Update 40: Overview of the COVID-19 pandemic](#)" (accessed 7<sup>th</sup> February 2021)



# ANNEX 1: Oxford Government Response Tracker

## 1. [Government Stringency Index of countries selected for evaluation](#)

