This tool helps fund managers identify opportunities to generate value from gender data for their fund, beyond just reporting on ESG performance. Review the list in each category and select the goals that can further your fund’s objectives.

### IMPROVE FUND POSITIONING

**COMPETITIVE ADVANTAGE**
- Establish brand image as the investor of choice for the target GLI entrepreneurs
- Differentiate fund as gender-lens pioneer to LPs and industry peers

**INDUSTRY LEADERSHIP**
- Build reputation, attract partnerships with relevant industry actors
- Share gender data and become a thought leader and influence LPs and peer’s perception of GLI

### IMPROVE FUND PERFORMANCE

**FINANCIAL OUTCOMES**
- Improve fund ROI, Gross Internal Rate of Return (IRR)
- Strengthen business case for GLI investments

**ESG OUTCOMES**
- Leverage intersectionality with other impact metrics (climate, poverty, etc.)
- Drive improvement of ESG performance at fund and portfolio level

### IMPROVE FUND PLANNING

**STRATEGIC PLANNING**
- Build internal case for investing in gender-forward sectors, actors, and opportunities
- Inform GLI strategy and investment thesis; establish gender goals, targets, milestones, benchmarks, etc.

**IMPROVE FUNDRAISING**
- Strengthen the business case for GLI to LPs for GLI
- Leverage GLI success stories to promote GLI visibility among LPs

### IMPROVE FUND PRODUCTS

**FINANCIAL OFFER**
- Diversify and differentiate investment instruments and offering to entrepreneurs beyond traditional funding models
- Design more attractive investment terms that value gender performance

**TECHNICAL ASSISTANCE**
- Provide more tailored and effective support to female-led and gender-forward business (pre- and post-investment)
- Build capacity of portfolio companies to integrate gender impact goals across their business model

### IMPROVE FUND PROCESSES

**PRE-INVESTMENT PROCESSES**
- Sourcing: “Revise criteria, channels, benchmarks, targeting, communication strategies to be more relevant to targeted GLI profiles; increase deal flow
- Due Diligence: “Revise/incorporate GLI criteria; establish rubrics and markers to de-risk and increase GLI investments

**POST-INVESTMENT PROCESSES**
- Portfolio management: “Create more effective initiatives to support GLI portfolio (cutting out ineffective initiatives)
- Exits: “Demonstrate sustainability of GLI portfolio unlock more follow-on funds and co-investment for GLI portfolio

### IMPROVE FUND PEOPLE / TEAM

**TEAM MANAGEMENT**
- Develop inclusive HR policies and talent management processes to increase internal diversity
- Promote DEI culture and values across organization
- Train and manage to mitigate gender bias and gender-related power dynamics

**TEAM PERFORMANCE**
- Establish gender performance targets, benchmarks, and incentives
- Support staff to look beyond the numbers when evaluating gender considerations

### HOW MIGHT WE LEVERAGE GENDER DATA TO CREATE VALUE FOR FUND?

**POSITIONING**
Differentiate and strengthen reputation among entrepreneurs and peers

**PRODUCT**
Improve value proposition, financial, and TA offering to entrepreneurs

**PERFORMANCE**
Demonstrate and communicate fund ESG and financial performance

**PROCESSES**
Improve decision making and investment processes from sourcing to exits

**PEOPLE**
Enhance team diversity, motivation, and performance

**PLANNING**
Inform & improve future investment decisions, fund strategy, and fundraising

**HOW MIGHT WE LEVERAGE GENDER DATA TO CREATE VALUE FOR FUND?**

- **POSITIONING**
  - Differentiate and strengthen reputation among entrepreneurs and peers
- **PRODUCT**
  - Improve value proposition, financial, and TA offering to entrepreneurs
- **PERFORMANCE**
  - Demonstrate and communicate fund ESG and financial performance
- **PROCESSES**
  - Improve decision making and investment processes from sourcing to exits
- **PEOPLE**
  - Enhance team diversity, motivation, and performance
- **PLANNING**
  - Inform & improve future investment decisions, fund strategy, and fundraising

---

*6P Data Bloom: Fund Checklist*

*Created by Jona Repishti and Saida Benhayoune. Under a Creative Commons Attribution-NonCommercial-NoDerivatives 4.0 International License.*
This tool helps fund managers (1) prioritize gender data goals that maximize value for their fund and (2) identify what data they have to collect and how to collect it.

**List top 3 opportunities to use gender data to create value for your fund.**

<table>
<thead>
<tr>
<th>1.</th>
<th>What metrics will you measure and collect?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>How will you use the data?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2.</th>
<th>What metrics will you measure and collect?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>How will you use the data?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>3.</th>
<th>What metrics will you measure and collect?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>How will you use the data?</td>
</tr>
</tbody>
</table>
This tool helps fund managers identify opportunities to generate value from gender data for their investees, beyond just reporting on ESG performance. Review the list in each category and select goals that can further your investee’s objectives.

**IMPROVE COMPANY POSITIONING**

- **COMPETITIVE ADVANTAGE**
  - Build trust and attract a new generation of values-driven customers
  - Improve brand reputation

- **INDUSTRY ALLIANCES**
  - Build alliances with industry peers, accelerators, and ecosystem actors to strengthen the case for gender impact
  - Align gender impact positioning with current and new GLI investors

**IMPROVE COMPANY PERFORMANCE**

- **FINANCIAL PERFORMANCE**
  - Monetize gender impact metrics and externalities (like climate externalities)
  - Correlate gender and financial metrics

- **IMPACT PERFORMANCE**
  - Demonstrate impact cost efficiency
  - Bolster evidence for ESG performance and/or intersectionality with other impact metrics

**IMPROVE COMPANY PLANNING**

- **BUSINESS STRATEGY**
  - Inform business development strategy to expand female customer base
  - Increase customer loyalty, retention, and sales

- **FUNDRAISING**
  - Attract GLI investors by leveraging gender impact success stories
  - Attract innovation and growth-focused investors by leveraging data on financial performance and showcasing growth opportunities in sector

**HOW MIGHT WE LEVERAGE GENDER DATA TO CREATE VALUE FOR INVESTEES?**

- **POSITIONING**
  - Differentiate company positioning and reputation within industry

- **PRODUCT**
  - Improve value proposition for target customers and beneficiaries

- **PROCESSES**
  - Improve business processes from customer acquisition to product and service delivery

- **PEOPLE**
  - Enhance management, motivation, and performance

- **PLANNING**
  - Inform and improve strategic planning, fundraising, and future growth

- **PERFORMANCE**
  - Demonstrate and communicate fund ESG and financial performance

**IMPROVE COMPANY PEOPLE / TEAM**

- **LEADERSHIP / WORKFORCE**
  - Close gender gaps and inequalities in leadership: attract, develop, retain, and promote gender-diverse and gender-forward staff
  - Establish progressive internal policies (equal pay, maternity leave, safe workplace, grievance processes)

- **ENABLING ENVIRONMENT**
  - Promote DEI culture and values among staff and leadership: mitigate gender bias and gender-related power dynamics
  - Incentivize staff performance by setting gender-impact milestones

**IMPROVE COMPANY PROCESS**

- **CUSTOMER ACQUISITION**
  - Improve messaging and outreach to existing and new female customers
  - Strengthen women’s participation in marketing and/or sales

- **PRODUCT / SERVICE DELIVERY**
  - Optimize delivery processes to maximize gender-impact (gender participation, capacity building, fair compensation)
  - Build gender-inclusive supply chains

- **IMPACT STRATEGY**
  - Improve gender impact for the customer/beneficiary and value chain
  - Augment trust and value to customers through success stories and visibility
This tool helps fund managers (1) prioritize goals that maximize value for their investees and (2) identify what data to collect and how to collect it.

**How might we leverage gender data to create value for investees?**

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Positioning</td>
<td>Differentiate company, positioning and reputation within industry</td>
</tr>
<tr>
<td>Product</td>
<td>Improve value proposition for target customers and beneficiaries</td>
</tr>
<tr>
<td>Processes</td>
<td>Improve business processes from customer acquisition to product and service delivery</td>
</tr>
<tr>
<td>Planning</td>
<td>Inform and improve strategic planning, fundraising, and future growth</td>
</tr>
<tr>
<td>Performance</td>
<td>Demonstrate and communicate fund ESG and financial performance</td>
</tr>
<tr>
<td>People</td>
<td>Enhance management, motivation, and performance</td>
</tr>
</tbody>
</table>

**List top 3 opportunities to use gender data to create value for your investee.**

1. ____________________________
   - What metrics will you measure and collect?
   - How will you use the data?

2. ____________________________
   - What metrics will you measure and collect?
   - How will you use the data?

3. ____________________________
   - What metrics will you measure and collect?
   - How will you use the data?