

Where has the GL Toolkit Been?

Many GCPF Financial Institutions have been supported by GCPF TA to use the GL Toolkit to Improve their Green Finance Portfolio in 2019

You can learn from their experiences



Promerica Costa Rica takes green to all its staff

Starting with a small head office team, Promerica built its Green Finance program for a few years, developing solar power projects and electric car initiatives. In 2019 the Bank was ready to take it wide to all its staff so that all its employees could bring sustainable and renewable power to its customers.



- The GL Toolkit Helped
- They had a Strategic Planning Workshop with their entire management team – Result: a strong plan to take their green finance program forward.
- 16 Champions were created to train staff and get everyone excited and ready to market green lending.
- The Portfolio and Sales Workshops helped sales people see how to find opportunities in their existing portfolio and how to pitch green lending to customers.



Banco Atlantida Salvador Needs a Strategy & Plan

Banco Atlantida has done well with large solar projects led mostly by a head office team. To mainstream green lending there is now a need for a new strategic plan and a broader reach into their market.

- The GL Toolkit Helped
- The management and key business staff used the Strategic Planning Workshop to lay out its opportunities and identify the key components of a strategic plan that defines the work that has to be done.
- Staff were challenged to identify their goals, the success factors and drivers to reach those goals and to do an assessment of their market and customers to focus the 2019-2022 plans.
- Environment and Social sustainability was also explored so that their plans would align with their over all sustainability strategies.





Nam A Bank Vietnam gets ready to sell

With market segmentation done and clear customer segments to target, Nam A Bank was ready to sell but its staff were not ready to pitch customers or talk about why they should look at green products.



The GL Toolkit Helped

- A full day sales training combined the champions training and sales training to help over 20 staff get ready to sell and learn:
- How to identify customers for each product and be able to overcome the challenges.
- How to understand the customer's energy management problems and ask the right questions.
- How to pitch the product.
- Sales people felt confident and excited about selling green products after the workshop.





TP Bank wants to understand the opportunity

TP Bank wants to build a formal green lending program and understand where the opportunity is for their large customer base.

The GL Toolkit Helped

- The strategic planning workshop was able to help the senior staff:
 1. Identify what kinds of plan and resources they will need.
 2. Identify a GL Team and structure to go after green business.
 3. Start the strategic planning process by identifying some goals and the success factors they will have to have in place to start a program.
 4. Next steps – they plan to do a full strategic planning workshop with business line managers to get the portfolio started across the bank.

