

## ANNEX 3

# Market actor interview request letter

**T**HIS ANNEX PROVIDES A SAMPLE LETTER TEMPLATE FOR REQUESTING interviews with different types of market actors (financial services providers [FSPs], supporting function providers, and regulators), with guidance on customizing the approach based on the specific actor type.

## Re: Introduction to Women's Financial Inclusion Research Study

This letter introduces a market research study on women's financial inclusion in [COUNTRY], conducted by [ORGANIZATION A] in collaboration with [ORGANIZATION B].

[ORGANIZATION A] is a market development program leading public/private partnerships to drive financial inclusion by encouraging regular and effective use of financial services. [ORGANIZATION A] is committed to gathering evidence on the needs of women and catalyzing stakeholders to develop market innovations through appropriate policies, regulations, and solutions.

As an evidence-driven organization, [ORGANIZATION A] has produced thought leadership pieces like [RESEARCH STUDY NAME], conducted with [LIST OF PARTNER ORGANIZATIONS] to measure financial inclusion progress and provide insights for financial sector players. [ORGANIZATION A] is launching this new research study to further support innovative, affordable, and consumer-driven financial solutions.

The study aims to understand factors influencing women's access to and use of financial services in [COUNTRY] by examining various market dynamics and barriers. The research will provide actionable insights to influence programs, policies, and product development.

[ORGANIZATION A] recognizes [FINANCIAL INSTITUTION NAME] as a key player in driving financial services uptake in [COUNTRY]. Your institution's insights on providing financial services to women customers are valuable. We request interviews with individuals in the following roles: [SELECT FROM LIST BELOW, DEPENDING ON ACTOR].

**For FSPs:** Member of senior management, product development, strategy, credit risk assessment; Customer-facing officer (branch level)

**For supporting function providers:** Member of senior management, strategy, product or service development (if relevant); Customer-facing officer (field based)

**For rule makers and regulators:** Representatives from the financial inclusion strategy unit, gender policy unit, data unit

We appreciate your support in making your team members available to our research team, which includes [LIST OF RESEARCHER NAMES]. As part of [ORGANIZATION A]'s research dissemination efforts, findings will be publicly shared in aggregate form with no specific reference to any institution or individual.

Data collection will run from [START DATE] to [END DATE].

We look forward to your upcoming collaboration.

Yours sincerely,

[SENDER NAME]

[TITLE]

[ORGANIZATION A]

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