

Measurement Survey Coaching [Phase1]

| Field | Question | Answer |
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| staff_name <i>(required)</i> | FINCA Staff name <i>SELECT FROM LIST BELOW:</i> | 3 Jacqueline 5 Josephine 7 Kakaire 8 Mary 11 Nandawula 15 Ssemombwe 100 My name is not on the list |
| staff_name_other <i>(required)</i> | FINCA Staff name <i>Specify here</i> <i>Question relevant when: selected(\${staff_name} , '100')</i> | |
| branch <i>(required)</i> | Branch <i>Select from list or start typing the branch name to filter the choices</i> | branch branch |
| f_name <i>(required)</i> | Client name <i>Select from list or start typing the client name to filter the choices</i> | f_name f_name |
| Duplicate_account_note <i>(required)</i> | This client [[f_name]] with account number [account_number] has already received the first coaching call (Phase1). Please use the coaching 'phase2' form or select another client for the first coaching phase <i>Question relevant when: \${account_number} = \${Duplicate_account_check}</i> | |
| client_contacts | <u>Client's Details</u> Name: [f_name] Account Number: [account_number] Phone number1: [Phone1] Phone number2: [Phone2] Phone number3 (for someone else who knows the client): [Phone3] | |

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| | <p>Target Amount: UGX[a] Goal: [g_v2] Target date: [g_reach_date_final]</p> <p>Current Account balance on [LEDGER_BAL_Date]: UGX[LEDGER_BAL] Previous balance: UGX[LEDGER_BAL_PREVIOUS] Change in account balance: UGX[LEDGER_BAL_CHANGE]</p> <p>Number of deposits: [DEPOSIT_COUNT] Number of withdrawals: [WITHDRAWAL_COUNT]</p> <p>Treatment: [treatment]</p> <p>Recruitment date: [recruitment_date]</p> | |
| successful_call <i>(required)</i> | Is the call to the client successful? | 1 Yes 2 No |
| increased_balance | <p><u>INTERVIEWER: INTRODUCE YOURSELF USING THE SCRIPT BELOW</u></p> <p>Hello, my name is [staff_name_v2] from FINCA.</p> <p>I am calling today just to check on you and see how you are doing.</p> <p><u>INTERVIEWER: ASK HOW THE CLIENT IT DOING? FAMILY? BUSINESS?</u></p> <p>Then talk about savings progress You set a goal of saving UGX[a] by [g_reach_date_final].</p> <p>So far, you have; Current Account balance on [LEDGER_BAL_Date]: UGX[LEDGER_BAL]</p> | |


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| | <p>Previous balance: UGX[LEDGER_BAL_PREVIOUS]</p> <p>Change in account balance: UGX[LEDGER_BAL_CHANGE]c</p> <p>It seems your account balance has increased over the past month.</p> <p>I would like to encourage you to keep saving so that you can reach your goal.</p> <p><i>INTERVIEWER: PLEASE NOTE WHAT THE CLIENTS SAYS IN THE SPACE BELOW. BE AS DETAILED AS POSSIBLE</i></p> <p><i>Question relevant when: \${successful_call} =1 and \${LEDGER_BAL_CHANGE} >=4000 and \${DEPOSIT_COUNT} >1</i></p> | |
| reduced_balance | <p><u>INTERVIEWER: INTRODUCE YOURSELF USING THE SCRIPT BELOW</u></p> <p>Hello, my name is [staff_name_v2] from FINCA.</p> <p>I am calling today just to check on you and see how you are doing.</p> <p><u>INTERVIEWER: ASK HOW THE CLIENT IT DOING? FAMILY? BUSINESS?</u></p> <p>Then talk about savings progress</p> <p>You set a goal of saving UGX[a] by [g_reach_date_final].</p> <p>So far, you have;</p> <p>Current Account balance on [LEDGER_BAL_Date]: UGX[LEDGER_BAL]</p> <p>Previous balance: UGX[LEDGER_BAL_PREVIOUS]</p> <p>Change in account balance: UGX[LEDGER_BAL_CHANGE]c</p> <p>It seems your account balance reduced somehow over the past month.</p> <p>Maybe you did some withdrawals?</p> <p>I would like to encourage you to try to be depositing something even if it is small. That way, you will reach your goal without straining.</p> <p><i>INTERVIEWER: PLEASE NOTE WHAT THE CLIENTS SAYS IN THE SPACE BELOW. BE AS DETAILED AS POSSIBLE</i></p> | |

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| | <p><i>Question relevant when: $\\${successful_call} = 1$ and $\\${LEDGER_BAL_CHANGE} < -2000$ and $\\${DEPOSIT_COUNT} > 1$</i></p> | |
| no_change | <p><u>INTERVIEWER: INTRODUCE YOURSELF USING THE SCRIPT BELOW</u></p> <p>Hello, my name is [staff_name_v2] from FINCA.</p> <p>I am calling today just to check on you and see how you are doing.</p> <p><u>INTERVIEWER: ASK HOW THE CLIENT IT DOING? FAMILY? BUSINESS?</u></p> <p>Then talk about savings progress You set a goal of saving UGX[a] by [g_reach_date_final].</p> <p>So far, you have; Current Account balance on [LEDGER_BAL_Date]: UGX[LEDGER_BAL] Previous balance: UGX[LEDGER_BAL_PREVIOUS] Change in account balance: UGX[LEDGER_BAL_CHANGE]c</p> <p>It seems you did not use your account much over the past one month. Did you face any challenges that made you not save towards your goal over the past month? what are they? <i>INTERVIEWER: PLEASE NOTE WHAT THE CLIENTS SAYS IN THE SPACE BELOW. BE AS DETAILED AS POSSIBLE</i></p> <p><i>Question relevant when: $\\${successful_call} = 1$ and $\\${DEPOSIT_COUNT} > 1$ and $\\${LEDGER_BAL_CHANGE} < 4000$ and $\\${LEDGER_BAL_CHANGE} > -1999$</i></p> | |
| no_account_usage | <p><u>INTERVIEWER: INTRODUCE YOURSELF USING THE SCRIPT BELOW</u></p> <p>Hello, my name is [staff_name_v2] from FINCA.</p> <p>I am calling today just to check on you and see how you are doing.</p> | |

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| | <p><u>INTERVIEWER: ASK HOW THE CLIENT IS DOING? FAMILY? BUSINESS?</u></p> <p>Then talk about savings progress You set a goal of saving UGX[a] by [g_reach_date_final].</p> <p>So far, you have; Current Account balance on [LEDGER_BAL_Date]: UGX[LEDGER_BAL] Previous balance: UGX[LEDGER_BAL_PREVIOUS] Change in account balance: UGX[LEDGER_BAL_CHANGE]c</p> <p>It seems you have not yet started using your account. ♣ What can we do to help you start using your account? ♣ What's the reason you are not using your account? <i>INTERVIEWER: PLEASE NOTE WHAT THE CLIENTS SAYS IN THE SPACE BELOW. BE AS DETAILED AS POSSIBLE</i> <i>Question relevant when: \${successful_call} =1 and \${DEPOSIT_COUNT} =1</i></p> | |
| topic_saving_benefits | <p>INTERVIEWER SAY: in our discussion today, I want us to talk about the Benefits of saving money</p> <ol style="list-style-type: none"> 1. Saving gives you financial security for life's uncertainties and increases feelings peace of mind. 2. Avoid unplanned spending - Because your money is in the bank, you cannot just spend it on any unplanned things anytime - unlike if you were saving at home. Remember the Goal account restricts you to one free withdrawal per month. This helps our clients not to withdraw frequently. 3. Save to avoid unnecessary debt - avoid the need to borrow" and "avoid paying interest on loans". Also, Avoid begging people for informal soft loans. 4. Ultimately, these savings will help you achieve your goals. <p><i>Question relevant when: \${successful_call} =1 and \${saving_benefits} =1</i></p> | |
| topic_savings_comparisons | <p>INTERVIEWER SAY: Let us to talk about Understanding and comparing different savings products' terms and conditions</p> | |

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| | <p>Some of the key features of the FINCA Goal account that differentiate it from other savings accounts include;</p> <ol style="list-style-type: none"> 1. The FINCA Goal account does not have account opening fees. Some other accounts require a customer to deposit an account opening fee which is difficult for many people. 2. No monthly ledger fees - The Goal account does not charge you monthly ledger fees like other accounts in other banks. 2. The Goal account also gives you one free withdrawal in 30 days. other withdrawals incur usual withdrawal charges. The reason for this is to limit withdrawals so that you can focus more on savings to reach your goal. <p>Remember, you can access your account by visiting any FINCA branch. FINCA has branches in most major towns including in [branch].</p> <p>You can also access your account via your phone.</p> <p>And finally, you can deposit and withdraw money from your account at any center agent.</p> <p>If you are interested in any other FINCA products, please visit our branch at [branch] and our staff will guide you.</p> <p><i>Question relevant when: ($\\${successful_call} = 1$ and $\\${savings_comparisons} = 1$ and $\\${saving_benefits} \neq 1$) or ($\\${successful_call} = 1$ and $\\${product_range} = 1$ and $\\${savings_comparisons} \neq 1$ and $\\${saving_benefits} \neq 1$)</i></p> | |
| topic_better_saver | <p>INTERVIEWER SAY: How to become a better saver</p> <p>There are four things that will help you become a better saver;</p> <ol style="list-style-type: none"> 1. Start now - Don't postpone saying "I'll save another day". Start now. | |

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| | <p>2. Start small - Start with any amount of money you have no matter how small. you can put aside even 500, or 1000 everyday. then deposit this to your account by the end of the week.</p> <p>3. Have a goal - It is easier to save if you have a goal or target.</p> <p>4. and finally, be consistent . Make sure you keep saving some money every mo th. you can try to save more if you can but don't go below your target.</p> <p>It is also important to know how to resist pressures from other family members so that your savings plans are not interfered with.</p> <p><i>Question relevant when: $\\${successful_call} = 1$ and $\\${better_saver} = 1$ and $\\${product_range} != 1$ and $\\${savings_comparisons} != 1$ and $\\${saving_benefits} != 1$</i></p> | |
| topic_better_saver2 | <p>INTERVIEWER SAY: How to become a better saver</p> <p>There are four things that will help you become a better saver;</p> <p>1. Start now - Don't postpone saying "I'll save another day". Start now.</p> <p>2. Start small - Start with any amount of money you have no matter how small. you can put aside even 500, or 1000 everyday. then deposit this to your account by the end of the week.</p> <p>3. Have a goal - It is easier to save if you have a goal or target. for your case, you already set a goal Target Amount: UGX[a] Goal: [g_v2] and you plan to reach this goal by [g_reach_date_final]</p> <p>4. and finally, be consistent . Your current goal is to save UGX[savings_per_month] every month. Make sure you don't save less. you can try to save more if you can but don't go below your target.</p> | |

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| | <p>It is also important to know how to resist pressures from other family members so that your savings plans are not interfered with.</p> <p><i>Question relevant when: $\{successful_call\} = 1$ and $\{saving_benefits\} = 2$ and $\{savings_comparisons\} = 2$ and $\{product_range\} = 2$ and $\{better_saver\} = 2$ and $\{fees\} = 2$ and $\{money_management\} = 2$ and $\{loan_comparisons\} = 2$ and $\{indebtedness\} = 2$ and $\{other_topics\} = 1$</i></p> | |
| topic_fees | <div data-bbox="1060 435 1123 500" style="text-align: center;">  </div> <p>INTERVIEWER SAY: How to avoid fees when using your saving account</p> <p>1. The best way to avoid charges on your deposits is to deposit directly at the branch or at any Cente agent.</p> <p>2. Avoiding Mobile Money Charges - if you are depositing money to your account via mobile, try NOT to deposit small amounts. The smaller the amount, the higher the % fee charged.</p> <p>INTERVIEWER - USE THE PICTURE BELOW TO EXPLAIN THE CHARGES ON MOBILE DEPOSITS</p> <p><i>Question relevant when: $\{successful_call\} = 1$ and $\{fees\} = 1$ and $\{better_saver\} != 1$ and $\{product_range\} != 1$ and $\{savings_comparisons\} != 1$ and $\{saving_benefits\} != 1$</i></p> | |
| topic_money_management | <p>INTERVIEWER SAY: Money management, budgeting skills</p> <p>Today, i will share only 3 ideas on money management and budgeting;</p> <p>1. Save what you can - Saving not dependent on how much you earn. All you need to do is to establish the intention to save something. for example, you decided to be setting aside UGX[savings_per_month] every month. Thats the best way to start.</p> <p>2. Save first, spend later - When you get money, make sure you put something aside before you start spending.</p> | |

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| | <p>3. Plan - Always have a plan for your money - how much do I earn, how much of it should i save, and how much should go to the needs of my family and myself.</p> <p><i>Question relevant when: $\\${successful_call} = 1$ and $\\${money_management} = 1$ and $\\${fees} \neq 1$ and $\\${better_saver} \neq 1$ and $\\${product_range} \neq 1$ and $\\${savings_comparisons} \neq 1$ and $\\${saving_benefits} \neq 1$</i></p> | |
| topic_loan_comparisons | <p>INTERVIEWER SAY: Understanding and comparing different loan products at FINCA</p> <p>In our previous discussion, you mentioned that you would be interested to know about the different loan products.</p> <p>Examples of loan products at FINCA</p> <p><u>Micro Individual Loan</u></p> <ul style="list-style-type: none"> - Loan amount UGX3 million to 5 million - Tenure 3 months to 24 months - interest 3.48%pm <p><u>Personal Development Loan</u></p> <ul style="list-style-type: none"> - Loan amount UGX2.5 million to 250 million - Tenure 3 months to 60 months - interest 2% to 3.28%pm <p><u>FINCA Easy Loan</u></p> <ul style="list-style-type: none"> - Loan amount UGX100,000 to 2.5 million - Tenure 1 month to 12 months - interest 5.73% pm <p>there are over 15 loan products available at FINCA that you can choose from.</p> <p>Please visit our branch at [branch] and our staff will be happy to give you more information about about loan products</p> | |

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| | <p>Question relevant when: $\\${successful_call} = 1$ and $\\${loan_comparisons} = 1$ and $\\${money_management} \neq 1$ and $\\${fees} \neq 1$ and $\\${better_saver} \neq 1$ and $\\${product_range} \neq 1$ and $\\${savings_comparisons} \neq 1$ and $\\${saving_benefits} \neq 1$</p> | |
| topic_indebtedness | <p>INTERVIEWER SAY: Risks of indebtedness</p> <p>In our previous discussion, you mentioned that you would be interested to know how to avoid the risk of indebtedness.</p> <p>I have only 4 suggestions can be helpful</p> <ol style="list-style-type: none"> 1. Only buy things that you can afford 2. Have some money for emergency. This can be something like savings in your goal account. 3. Stick to a Savings Routine 4. Cut-out the wants, focus on the needs <p>Question relevant when: $\\${successful_call} = 1$ and $\\${indebtedness} = 1$ and $\\${loan_comparisons} \neq 1$ and $\\${money_management} \neq 1$ and $\\${fees} \neq 1$ and $\\${better_saver} \neq 1$ and $\\${product_range} \neq 1$ and $\\${savings_comparisons} \neq 1$ and $\\${saving_benefits} \neq 1$</p> | |
| topic_other_topics | <p>INTERVIEWER: HAVE A GENERAL DISCUSSION WITH THE CLIENT ON THIS</p> <p>[other_topic_des]</p> <p>Question relevant when: $\\${successful_call} = 1$ and $\\${other_topics} = 1$ and $\\${indebtedness} \neq 1$ and $\\${loan_comparisons} \neq 1$ and $\\${money_management} \neq 1$ and $\\${fees} \neq 1$ and $\\${better_saver} \neq 1$ and $\\${product_range} \neq 1$ and $\\${savings_comparisons} \neq 1$ and $\\${saving_benefits} \neq 1$</p> | |
| next_steps <i>(required)</i> | <p>Thinking about your current savings goal, what action will you do that can help you reach this goal?</p> <p>Target Amount: UGX[a] Goal: [q_v2] Target date: [q_reach_date_final]</p> | |

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| | <i>Question relevant when: \${successful_call} =1</i> | |
| SMS <i>(required)</i> | <p>Did you read the SMS message that we sent you recently from FINCA?</p> <p><i>Question relevant when: \${successful_call} =1</i></p> | <p>1 Yes, I read the message</p> <p>No, I didn't read the</p> <p>2 message but I received it</p> <p>3 I didn't receive the message</p> |
| SMS_meaning <i>(required)</i> | <p>What did the message mean to you?</p> <p><i>Question relevant when: selected(\${SMS} , '1')</i></p> | |
| topics <i>(required)</i> | <p>What is the most important topic that you would like us to discuss in our call next month?</p> <p><i>Question relevant when: \${successful_call} =1</i></p> | <p>1 Benefits of saving money</p> <p>Understanding and comparing different</p> <p>2 savings products' terms and conditions</p> <p>Understanding the range of financial</p> <p>3 products, services and digital channels</p> <p>4 How to become a better saver</p> <p>How to avoid fees</p> <p>5 when using your saving account</p> <p>6 Money management, budgeting skills</p> <p>Understanding and</p> <p>7 comparing different loan products</p> |

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| | | 8 Risks of indebtedness 9 Interest rates on savings 10 Just a courtesy call 11 Small Business Management 12 Mobile Banking Charges 13 None/ Don't Know 100 Any other topics, please specify |
| topics_other <i>(required)</i> | What other topics would you like us to discuss in our call next month? <i>Other, Specify here</i> <i>Question relevant when: selected(\${topics} , '100')</i> | |
| client_feedback | Do you have any comments or suggestions for me today? <i>Question relevant when: \${successful_call} =1</i> | |
| no_called <i>(required)</i> | Please fill in the reason why the client was not coached this time. <i>Question relevant when: \${successful_call} =2</i> | |
| end_call | Thank the client and close the call <i>Question relevant when: \${successful_call} =1</i> | |