

Measurement Survey Face to Face Coaching [Phase6]

Field	Question	Answer
staff_name <i>(required)</i>	FINCA Staff name <i>SELECT FROM LIST BELOW:</i>	3 Jacqueline 5 Josephine 8 Mary 11 Nandawula 15 Ssemombwe 100 My name is not on the list
staff_name_other <i>(required)</i>	FINCA Staff name <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 face to face coaching call (Phase6). Please use the coaching 'phase7' 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]	

	<p>Target Amount: UGX[a] Goal: [g_v2] Target date: [g_reach_date_final] Recruitment date: [recruitment_date]</p>	
transaction_details	<p><u>Client's Transaction Details</u> Name: [f_name] Ledger Balance 2Jan2023 UGX[LEDGER_BAL1] Ledger Balance 3March2023 UGX [LEDGER_BAL2] Ledger Balance 30March2023 UGX [LEDGER_BAL3] Ledger Balance 22May2023 UGX [LEDGER_BAL4] Ledger Balance 13June2023 UGX [LEDGER_BAL5] Ledger Balance 30June2023 UGX [LEDGER_BAL6] Ledger Balance 15September2023 UGX [LEDGER_BAL7] Ledger Balance 10October2023 UGX [LEDGER_BAL8] CHANGE IN LEDGER BALANCE FROM PREVIOUS MONTH UGX [LEDGER_BAL_CHANGE] Number of Deposits - [DEPOSIT_COUNT] Number of Withdrawals - [WITHDRAWAL_COUNT]</p>	
successful_call (required)	Did you meet the client?	1 Yes 2 No
not_successful (required)	Interviewer: select indicate why the call was not successful <i>Question relevant when: \${successful_call} =2</i>	
increased_balance	<u>Coaching script for clients with increasing savings balance</u> INTERVIEWER: Please use the following points when talking with the client 1. Make sure you are familiar with the client's transaction history. If in doubt, go back to the previous pages to check. 2. Start with greetings a. Hello, thank you for meeting me today. I'm happy to see you again. b. Congratulations on your savings progress!	

	<p>3. Talk about the client's savings goal [a] and some of the things she would spend the money on once the goal is achieved ([g_v2])</p> <p>4. Talk about the progress so far in saving towards the goal. Refer to the progress in the previous question</p> <p>a. How do you feel about making such good progress towards your goal?</p> <p>b. How do you manage to be so consistent in saving?</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.</p> <p>4. and finally, be consistent . Make sure you keep saving some money every month. 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: $\\${LEDGER_BAL_CHANGE} > 3999$ and $\\${DEPOSIT_COUNT} > 1$</i></p>	
reduced_balance	<p><u>Coaching script for clients with decreased savings balance</u></p> <p>INTERVIEWER: Please use the following points when talking with the client</p> <p>1. Make sure you are familiar with the client's transaction history. If in doubt, go back to the previous pages to check.</p> <p>2. Start with greetings</p> <p>a. Hello, thank you for meeting me today. I'm happy to see you again.</p> <p>b. Am here today to talk about your saving progress in the Goal account!</p>	

	<p>3. Talk about the client's savings goal [a] and some of the things she would spend the money on once the goal is achieved ([g_v2])</p> <p>4. Talk about the progress so far in saving towards the goal. Refer to the progress in the previous question</p> <ol style="list-style-type: none"> It seems that you have been using your account which is very good. But I also see that your account balance is reducing. Tell me about that. What challenges are you facing? What can you do to resume saving towards your goal? <p>5. Talk about the benefits of saving</p> <ol style="list-style-type: none"> Saving gives you financial security for life's uncertainties and increases feelings peace of mind. 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. Save to avoid unnecessary debt - avoid the need to borrow" and "avoid paying interest on loans". Also, Avoid begging people for informal soft loans. Ultimately, these savings will help you achieve your goals. <p><i>Question relevant when: $\\${successful_call} = 1$ and $\\${LEDGER_BAL_CHANGE} < -2000$ and $\\${DEPOSIT_COUNT} > 1$</i></p>	
no_change	<p><u>Coaching script for clients with who made some deposits but then seem to have stopped depositing</u></p> <p>INTERVIEWER: Please use the following points when talking with the client</p> <ol style="list-style-type: none"> Make sure you are familiar with the client's transaction history. If in doubt, go back to the previous pages to check. Start with greetings <ol style="list-style-type: none"> Hello, thank you for meeting me today. I'm happy to see you again. Am here today to talk about your saving progress in the Goal account! Talk about the client's savings goal [a] and some of the things she would spend the money on 	

	<p>once the goal is achieved ([g_v2])</p> <p>4. Talk about the progress so far in saving towards the goal. Refer to the progress in the previous question</p> <ol style="list-style-type: none"> a. It seems that you started using your account which is very good. b. But I also see that your account balance has not been changing in the recent months. You have not been making any more savings. Tell me about that. c. What challenges are you facing? d. What can you do to resume saving towards your goal? <p>5. Today, i will share only 3 ideas on money management and budgeting;</p> <ol style="list-style-type: none"> 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. 2. Save first, spend later - When you get money, make sure you put something aside before you start spending. 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><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>Coaching script for clients with who have not started using their account</u></p> <p>INTERVIEWER: Please use the following points when talking with the client</p> <ol style="list-style-type: none"> 1. Make sure you are familiar with the client's transaction history. If in doubt, go back to the previous pages to check. 2. Start with greetings <ol style="list-style-type: none"> a. Hello, thank you for meeting me today. I'm happy to see you again. b. Am here today to talk about your saving progress in the Goal account! 3. Talk about the client's savings goal [a] and some of the thins she would spend the money on 	

	<p>once the goal is achieved ([g_v2])</p> <p>4. Talk about the progress so far in saving towards the goal. Refer to the progress in the previous question</p> <p>a. It seems you have never used your account since you opened it.</p> <p>b. What challenges are you facing?</p> <p>c. What can you do to start saving towards your goal?</p> <p>5. Talk about the benefits of saving</p> <p>a. Saving gives you financial security for life's uncertainties and increases feelings peace of mind.</p> <p>b. 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.</p> <p>c. Save to avoid unnecessary debt - avoid the need to borrow" and "avoid paying interest on loans". Also, Avoid begging people for informal soft loans.</p> <p>d. Ultimately, these savings will help you achieve your goals.</p> <p><i>Question relevant when: $\\${successful_call}=1$ and $\\${DEPOSIT_COUNT}<2$</i></p>	
barrier <i>(required)</i>	<p>What would you say is the biggest barriers to your goal?</p> <p><i>Question relevant when: $\\${successful_call}=1$</i></p>	
solution <i>(required)</i>	<p>What can I do as your coach to help you overcome that barrier?</p> <p><i>Question relevant when: $\\${successful_call}=1$</i></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><i>Question relevant when: $\\${successful_call}=1$</i></p>	
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</p> <p>it</p> <p>I didn't receive the</p> <p>3 message</p>
SMS_meaning_coded <i>(required)</i>	<p>What did the message mean to you?</p>	<p>1 Reminder to save</p>

	<p><i>Question relevant when: selected(\${SMS} , '1')</i></p> <p><i>Response constrained to: not((selected(., 2) or selected(., 3) or selected(., 4)) and count-selected(.) > 1)</i></p>	<p>2 Nothing/ Can't explain</p> <p>3 Did not pay attention to the SMS</p> <p>4 Did not understand the SMS</p> <p>5 Encouragement to save</p> <p>6 FINCA cares/loves about me</p> <p>7 FINCA is serious about my goal</p> <p>8 FINCA recognises me as a customer</p> <p>9 Good wishes/ Holiday wishes</p> <p>10 My account information</p> <p>100 Other, Specify</p>
SMS_meaning <i>(required)</i>	<p>What did the message mean to you?</p> <p><i>Other, Specify here</i></p> <p><i>Question relevant when: selected(\${SMS_meaning_coded} , '100')</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>2 Understanding and comparing different savings products' terms and conditions</p> <p>3 Understanding the range of financial</p>

		products, services and digital channels 4 How to become a better saver How to avoid fees 5 when using your saving account 6 Money management, budgeting skills Understanding and 7 comparing different loan products 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>	
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>	
incentive	INTERVIEWER: Give the clients cash incentive UGX5,000	

	<p>Say – “This is a small amount to buy something for the kids today OR Just to help out with today’s shopping”</p> <p>Thank the client and close the discussion</p> <p><i>Question relevant when: $\\${successful_call} = 1$</i></p>	
client_feedback	<p>What are the most important points that you discussed with the client today. Things that the client identified.</p> <p><i>Question relevant when: $\\${successful_call} = 1$</i></p>	
coaches_feedback <i>(required)</i>	<p>[staff_name_v2], what feedback can you give about the discussion that you have just had with [f_name]Do you think you have had a meaningful impact on [f_name]’s commitment to use her savings account? Please explain.</p> <p><i>Question relevant when: $\\${successful_call} = 1$</i></p>	
outcome_rating <i>(required)</i>	<p>Based on todays conversation, please rate the likelihood of the client using their account</p> <p><i>Question relevant when: $\\${successful_call} = 1$</i></p>	<p>1 Extremely Unlikely</p> <p>2 Unlikely</p> <p>3 Neutral</p> <p>4 Likely</p> <p>5 Extremely Likely</p>