

## Measurement Survey Telephonic Onboarding

| Field                                    | Question  | Answer   |
|--|---|--|
| staff_name <i>(required)</i>             | FINCA Staff name<br><i>SELECT FROM LIST BELOW:</i>  | 3 Jacqueline<br>5 Josephine<br>7 Kakaire<br>8 Mary<br>11 Nandawula<br>15 Ssemombwe<br>100 My name is not on the list |
| staff_name_other <i>(required)</i>       | FINCA Staff name<br><i>Question relevant when: selected( \${staff_name} , '100')</i>  |  |
| branch <i>(required)</i>                 | Branch<br><i>SELECT FROM LIST BELOW:</i>  | branch branch  |
| f_name <i>(required)</i>                 | Client name<br><i>SELECT FROM LIST BELOW:</i>   | f_name f_name  |
| Duplicate_account_note <i>(required)</i> | This client with account number [account_number] has already been onboarded via telephonic interview.<br><br>Please select another client for onboarding<br><i>Question relevant when: \${account_number} = \${Duplicate_account_check}</i> |  |
| client_contacts                          | <u>Client's Details</u><br>Name: [f_name]<br>Account Number: [account_number]<br><br>Phone number1: [Phone1]<br>Phone number2: [Phone2]<br>Phone number3 (for someone else who knows the client): [Phone3]                                  |  |

|                                    |   |   |
|------------------------------------|---|---|
|                                    | <p>Target Amount: UGX[a]</p> <p>Goal: [g_v2]</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]</p> <p>Number of deposits: [DEPOSIT_COUNT]</p> <p>Number of withdrawals: [WITHDRAWAL_COUNT]</p> <p>Treatment: [treatment]</p> <p>Recruited by: [recruitment_staff]</p> <p>Recruitment date: [recruitment_date]</p>   |   |
| successful_call <i>(required)</i>  | Is the call to the client successful?   | <p>1 Yes</p> <p>2 No</p>  |
| tele_onboarding_note               | <p>INTERVIEWER: INTRODUCE YOURSELF USING THE SCRIPT BELOW</p> <p>Hello, my name is [staff_name_v2] from FINCA.</p> <p>Remember we spoke almost two weeks ago concerning your goal account. At that time we went through your goal of saving UGX[a] over the next 12 months. We also discussed the key features of the goal account and how you can access it through the branch, mobile or via center agents</p> <p>Am calling today to simply check on you and find out if everything is ok.</p> <p><i>Question relevant when: \${successful_call}=1</i></p> |   |
| client_situation <i>(required)</i> | <p>Is everything ok and you are ready to use your account?</p> <p><i>Question relevant when: \${successful_call}=1</i></p>  | <p>Yes, everything is ok</p> <p>1 but I have not started using my account</p> <p>2 Yes, everything is ok and I have already</p> |

|                                   |  |   |
|-----------------------------------|--|---|
|                                   |  | <p>started using my account</p> <p>I have some 3 questions/problems with my account</p>   |
| <p>problems <i>(required)</i></p> | <p>What problems are you having with your account?</p> <p><i>Question relevant when: selected( \${client_situation} , '3')</i></p> | <p>1 I don't have my account number</p> <p>2 I don't have money to save yet</p> <p>3 My business is slow now but I will start saving when business picks up</p> <p>4 I don't know where the FINCA branch is</p> <p>5 I don't know where Cente agents are located</p> <p>10 Problems using mobile banking it is expensive to</p> <p>6 deposit money via phone</p> <p>7 I no longer want this account</p> <p>8 I no longer want to receive calls from FINCA</p> |

|                                  |  |   |
|----------------------------------|--|---|
|                                  |  | <p>I don't have the FINCA call centre number that I can use in case of any question</p> <p>9</p> <p>Other problems, please specify</p> <p>100</p> |
| problems_other <i>(required)</i> | <p>What problem are you having with your account?<br/>Please specify here</p> <p><i>Question relevant when: selected( \${problems} , '100')</i></p>  |   |
| solution1                        | <p>INTERVIEWER: PLEASE GIVE THIS ACCOUNT NUMBER TO THE CLIENT</p> <p>[account_number]<br/>You can read it out to her then also send it to her via sms</p> <p><i>Question relevant when: selected( \${problems} , '1')</i></p>  |   |
| solution2                        | <p>INTERVIEWER: Explain to the client that we understand savings can be challenging but FINCA is here to work with you. You can start savings whenever you are able to</p> <p><i>Question relevant when: selected( \${problems} , '2') or selected( \${problems} , '3')</i></p>  |   |
| solution4                        | <p>Interviewer: please explain to the client where the FINCA branch nearest to her is located</p> <p><i>Question relevant when: selected( \${problems} , '4')</i></p>  |   |
| solution5                        | <p>Interviewer: please explain to the client where the cente agent nearest to her is located</p> <p><i>Question relevant when: selected( \${problems} , '5')</i></p>   |   |
| solution6                        | <p>INTERVIEWER: <u>Please explain the costs and charges related to the goal account using the following points</u></p> <ul style="list-style-type: none"> <li>• To avoid extra mobile money charges, you should only deposit small amounts through the cente agents or directly in branches to avoid fees charged by MTN/ Airtel.</li> <li>• Alternatively, you can deposit small amounts to your Mobile wallets (MTN or Airtel - free of charge) to avoid diverting the money and only send once, when the amounts have accumulated and pay a small charge, which would otherwise be transported to branch but save on time.</li> </ul> |   |

|                                     |  |                          |
|-------------------------------------|--|--------------------------|
|                                     | <p>o Depositing money at the branch is free</p> <p>o Depositing money via Centenary agents is also free</p> <p>o If you deposit money to your FINCA Goal account using money via Mobile Money, MTN and Airtel will charge you some amount</p> <ol style="list-style-type: none"> <li>1. Minimum deposit via mobile in UGX5001</li> <li>2. The smaller the amount you deposit via mobile the higher the relative charges. for example, if you deposit UGX5001 via Mobile Money, this comes with a charge of about UGX700. This amount is charged by MTN/ Airtel, not FINCA</li> </ol> <p><i>Question relevant when: selected( \${problems} , '6')</i></p> |                          |
| solution7                           | <p>Please thank the client for giving us the opportunity to serve her.</p> <p>Inform her the account closure process will be started.</p> <p>Share her details with Scovia/ Justine/ and Nathaniel to initiate the account closure process</p> <p><i>Question relevant when: selected( \${problems} , '7')</i></p>   |                          |
| solution8                           | <p>Please thank the client for giving us the opportunity to serve her and inform her that we will not be calling her about the survey again. But FINCA might call her for other products and services.</p> <p><i>Question relevant when: selected( \${problems} , '8')</i></p>   |                          |
| solution9                           | <p>Please give out FINCA Call Centre number as contact for any additional info (031 223 2300).</p> <p><i>Question relevant when: selected( \${problems} , '9')</i></p>   |                          |
| solution100                         | <p>INTERVIEWER: Advise the client that the call centre will follow up to resolve her issue.</p> <p>Share the clients issue with Scovia/Justine/ Nathaniel for further action.</p> <p><i>Question relevant when: selected( \${problems} , '100')</i></p>  |                          |
| feedback <i>(required)</i>          | <p>is there anything else you'd like to inform us regarding your account, the goal or the research?</p> <p><i>Question relevant when: \${successful_call} =1</i></p>   | <p>1 Yes</p> <p>2 No</p> |
| feedback_describe <i>(required)</i> | <p>Please describe the clients feedback here</p> <p><i>Question relevant when: selected( \${feedback} , '1')</i></p>   |                          |

|   |  |                          |
|---|--|--------------------------|
| <p>coaching_note</p>                          | <p>FINCA STAFF SAY:</p> <p>FINCA is offering personalized reminders and tips (free of charge) to our clients who are ready to save and reach their goals.</p> <p>The aim of the coaching is to provide you helpful tips and advices, as well as reminders to help you save sucessfully and achieve your goals on time.</p> <p>The coaching is done through phone calls from the FINCA Call Centre and through SMS from FINCA.</p> <p>I will be calling you on a monthly basis to go over this</p> <p><a href="#">To facilitate our discussions, please tell me which of the following topics you'd like more information on?</a></p> |                          |
| <p>reserved_name_for_field_list_labels_52</p> |  | <p>1 Yes</p> <p>2 No</p> |
| <p>saving_benefits <i>(required)</i></p>      | <p>Benefits of saving money</p>  | <p>1 Yes</p> <p>2 No</p> |
| <p>savings_comparisons <i>(required)</i></p>  | <p>Understanding and comparing different savings products' terms and conditions</p>  | <p>1 Yes</p> <p>2 No</p> |
| <p>product_range <i>(required)</i></p>        | <p>Understanding the range of financial products, services and digital channels</p>  | <p>1 Yes</p> <p>2 No</p> |
| <p>better_saver <i>(required)</i></p>         | <p>How to become a better saver</p>  | <p>1 Yes</p> <p>2 No</p> |
| <p>fees <i>(required)</i></p>                 | <p>How to avoid fees when using your saving account</p>  | <p>1 Yes</p> <p>2 No</p> |

|                             |   |               |
|-----------------------------|---|---------------|
| money_management (required) | Money management, budgeting skills  | 1 Yes<br>2 No |
| loan_comparisons (required) | Understanding and comparing different loan products   | 1 Yes<br>2 No |
| indebtedness (required)     | Risks of indebtedness   | 1 Yes<br>2 No |
| other_topics (required)     | Any other topics, please specify  | 1 Yes<br>2 No |
| other_topic_des (required)  | Please describe any other topics you'd like me to discuss with you during our monthly calls<br><i>Question relevant when: selected( \${other_topics} , '1')</i>   |               |
| onboarding_end              | FINCA STAFF SAY:<br><br>Thank you for choosing to set your savings goal and open a savings account with FINCA.<br><br>Remember, if you have any questions you can reach out to the FINCA call centre any time by calling 031 223 2300.<br><br>You can also call me any time using this number (INTERVIEWER: CONFIRM YOUR NUMBER TO THE CLIENT)<br><i>Question relevant when: \${successful_call} =1</i> |               |
| no_called (required)        | Please fill in the reason why the client was not called this time.<br><i>Question relevant when: \${successful_call} =2</i>   |               |