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Model Surveys

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This tool presents two model surveys. The first survey can be used to evaluate the effectiveness of a branding campaign. The second survey can be used to gather information about new savers in the institution. Readers should adapt the surveys to fit the needs of their own institutions.

EVALUATE EFFECTIVENESS OF BRANDING CAMPAIGN

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1. What publicity do you remember having heard, seen, or read recently about financial institutions?

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2. For which financial institution was the publicity?

Do not remember ____

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3. In which medium did you see, hear, or read it?

Television ____ Radio ____ Newspaper ____ Billboard ____
Traveling megaphone ____ Do not remember ____

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4. Do you think what the publicity says is true?

Yes, it is true ____
It is somewhat true ____
It is not true ____
Do not know ____

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5. What publicity do you remember having heard, seen, or read recently about credit unions?

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6. For which credit union was the publicity?

Do not remember ____

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7. In which medium did you see, hear, or read it?

Television ____ Radio ____ Newspaper ____ Billboard ____
Traveling megaphone ____ Don't remember ____

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8. Do you think what the publicity says is true?

Yes, it is true ____
It is somewhat true ____
It is not true ____
Do not know ____

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9. Which credit unions do you remember from the publicity?

Do not remember any ____ (Go to question 11.)

10. Can you tell me where these credit unions are located?

Do not remember ____

11. What mediums of communication do you see, listen to, or read daily?
Television ____ Radio ____ Newspaper ____ Billboard ____
Traveling megaphone ____ None ____

12. Gender
Male ____ Female ____

13. Marital Status
Married ____ Single ____ Divorced ____ Widowed ____

14. Age

15. Occupation

16. Monthly Income

17. What type of accounts do you hold?
Passbook Savings ____ Fixed-term Certificate of Deposit ____
Checking Account ____ Youth Savings Account ____
Planned Savings ____ Loans ____
Other (please explain) _____

18. With which types of financial institutions do you have the accounts?
Bank ____ Credit Union ____ NGO ____ Finance Company ____
Other (please explain) _____

INSTITUTION NAME _____ AGENCY _____

Name of the Interviewer _____

Date _____

GATHER INFORMATION ABOUT NEW CLIENT SAVERS

CLIENT NO. _____ ACCOUNT NO. _____

OPENING AMOUNT _____

1. Type of Account

Passbook Savings Account _____	Fixed-term Certificate of Deposit _____
Youth Savings Account _____	Planned Savings _____
Share Contribution _____	

2. How did you find out about **NAME OF SAVINGS INSTITUTION?**

Radio _____	Newspaper _____
Billboard _____	Banner _____
Promotion/Prizes _____	Fliers _____
Visit from a promoter/officer _____	Traveling megaphone _____
Existing client referral _____	Director referral _____
Family/Friend referral _____	Walked by the institution _____
Other (<i>please explain</i>) _____	

3. What is the principal reason why you chose to open an account in **NAME OF SAVINGS INSTITUTION?**

Security _____ Location _____ Interest rate offered _____ Access to credit _____
 Other (*please explain*) _____

4. With which other types of financial institutions do you have accounts?

Bank _____ Credit Union _____ NGO _____ Finance Company _____
 Other (*please explain*) _____ No other _____

5. What type of accounts do you have with other institutions?

Passbook Savings _____	Fixed-term Certificate of Deposit _____
Checking Account _____	Youth Savings Account _____
Planned Savings _____	Loans _____
Other (<i>please explain</i>) _____	

6. Gender

Female _____ Male _____

INSTITUTION NAME _____ AGENCY _____

Name of the Interviewer _____

Date _____