

TOOL

11

Model Surveys

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This tool presents two model surveys. The first survey can be used to find out about the demographics of the local market. The second survey can be used to find out about the reputation of your institution in the local market. Readers should adapt the surveys to fit the needs of their own institutions.

FIND OUT ABOUT THE LOCAL MARKET

Good morning, my name is **NAME**. I work for **NAME OF SAVINGS INSTITUTION**.
I would appreciate it if you could give me ten minutes of your time.

I would like to ask you some questions about the savings and credit services provided by **NAME OF SAVINGS INSTITUTION**. We would like to learn what you think in order to be able to provide you with services that meet your needs.

GENERAL

1. What financial institution do you prefer to use here in **NAME OF TOWN**?
Bank ____ Credit Union ____ NGO ____ Moneylender ____ Other _____

2. Why do you prefer this institution?
Security ____ Location ____ Hours of operation ____ Service ____
Prizes/Promotions ____ Image ____ Other _____

3. What type of services do you use from that institution?
Passbook savings ____ Planned savings ____ Fixed-term savings ____ Loans ____
Other _____

(Depending on answer to question 3, select questions 4 through 9)

SAVINGS

4. How frequently do you save?
Monthly ____ Weekly ____ Daily ____ Other _____

5. What interest rate are you paid for your savings?
____% Don't know ____

6. What do you save for?
Security ____ Emergencies ____ Health ____ Housing ____ Purchase goods ____
Education ____ To earn interest ____ To obtain credit ____ Other _____

7. How much do you usually save each month?
\$0-25 ____ \$26-50 ____ \$51-100 ____ \$101-250 ____ More than \$250 ____

LOANS

8. How much interest do you pay for your loan?
____%
Is that Annually ____ Monthly ____ Daily ____ Don't know ____

9. Do you know of any credit union here in **NAME OF TOWN**?
Yes ____ No ____ (If "Yes") Which one do you know of? _____

10. What is your opinion of this credit union?
Excellent ____ Good ____ Bad ____

11. Have you heard of **NAME OF SAVINGS INSTITUTION**?
Yes ____ No ____

(If the answer is "Yes", ask questions 12 and 13).

12. What have you heard or what is your personal opinion about **NAME OF SAVINGS INSTITUTION**?

Good ____ Average ____ Bad ____

13. How did you hear about **NAME OF SAVINGS INSTITUTION**?

Radio ____ Newspaper ____ Traveling megaphone ____ Fliers ____ Banners ____
Friends/family ____ Other _____

14. If **NAME OF SAVINGS INSTITUTION** were to open a branch here in **NAME OF TOWN**, what service would you be most likely to use initially?

Savings ____ Loans ____ Other _____ (Specify)

(If the answer to above is "Loans," ask questions 15, 16, and 17; otherwise go directly to question 18.)

15. What would you use the loan for?

Business ____ Housing ____ Agriculture ____ Education ____
Personal Expenses ____ Other _____

16. How much of a loan would you need right now?

Less than \$500 ____ Between \$501 and \$1,000 ____
Between \$1,001 and \$5,000 ____ More than \$5,000 ____

17. How would you like to pay off your loan?

Monthly ____ Weekly ____ Daily ____ Other _____ (Specify).

18. Would you like to receive a visit from a promoter of **NAME OF SAVINGS INSTITUTION**, so that you can learn more about the advantages of our services?

Yes ____ No ____

(If the answer is "Yes", ask the following question).

19. At what time would you like for us to visit?

Morning ____ Afternoon ____ Evening ____ Weekend ____

Once the survey is completed, the interviewer asks for information about the interviewee, thanks the interviewee for taking the time to answer questions, and offers a promotional item from the institution. This information is useful to validate the survey and create a client and potential client database.

NAME _____

ADDRESS _____

OCCUPATION _____

Name of the Interviewer _____

Date _____

FIND OUT ABOUT THE REPUTATION OF YOUR CREDIT UNION IN THE LOCAL MARKET

Good morning, my name is **NAME**. I work for **NAME OF CREDIT UNION**. I would appreciate it if you could give me ten minutes of your time. I would like to ask you a few questions about your knowledge of credit unions here in **NAME OF TOWN**.

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1. Do you know about the existence of a new credit union here in **NAME OF TOWN**?
Yes ____ No ____

(If the answer is "Yes", continue with the interview)

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2. Could you tell me the name of the credit union?

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3. How did you learn about the arrival of the credit union?

Radio ____ Cable TV ____ Traveling megaphone ____ Brochure ____ Flier ____
Promoter ____ Other _____

-
4. Where are their offices located?

-
5. Can you identify the logo of the credit union?

(Show a poster board with three different logos, one of the credit union)

Correct ____ Incorrect ____

-
6. Are you a member of the **NAME OF CREDIT UNION**?

Yes ____ No ____

**(If the answer is "Yes", ask questions 7, 8 and 9;
if the answer is "No", go directly to question 10.)**

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7. Which service have you used in the past or are you using now?

Passbook Savings ____ Planned Savings ____ Fixed-Term Savings ____
Loans ____ Other _____

-
8. What is your opinion about this particular service?

Excellent ____ Good ____ Average ____ Bad ____

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9. How would you personally evaluate the image of **NAME OF CREDIT UNION**?

Excellent ____ Good ____ Average ____ Bad ____

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10. Why have you **not** joined **NAME OF CREDIT UNION**?

Time ____ Distance ____ Image ____ Lack of security ____

Lack of information ____ Requirements ____ Other _____ *(Specify)*

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11. Have you received a personal visit from a promoter of **NAME OF CREDIT UNION**?

Yes ____ No ____

(If the answer is "yes," ask the following question)

12. How would you rate the visit from the promoter?

Excellent ____ Good ____ Average ____ Bad ____

Once the survey is completed, the interviewer asks for information about the interviewee, thanks the interviewee for taking the time to answer questions, and offers a promotional item from the institution. This information is useful to validate the survey and create a client and potential client database.

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Name of the Interviewer _____

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