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

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

2. For which financial institution was the publicity?
   ___________________________________________________________________
   Do not remember ___

3. In which medium did you see, hear, or read it?
   Television ____  Radio ____  Newspaper ____  Billboard ____
   Traveling megaphone ____  Do not remember ___

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 ___

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

6. For which credit union was the publicity?
   ___________________________________________________________________
   Do not remember ___

7. In which medium did you see, hear, or read it?
   Television ____  Radio ____  Newspaper ____  Billboard ____
   Traveling megaphone ____  Don’t remember ___

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 ___

9. Which credit unions do you remember from the publicity?
   ___________________________________________________________________
   ___________________________________________________________________
   ___________________________________________________________________
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) ________________________________
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 (please explain) ______________________________

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 (please explain) ______________________________

6. Gender
   - Female ____
   - Male ____

INSTITUTION NAME __________________________ AGENCY ___________________________
Name of the Interviewer ___________________________________________________________
Date ___________________________________________________________________________