

Chapter 7

 Tool 4:

Client
Satisfaction

- 7.1 The Client Satisfaction Tool
- 7.2 Why the Client Satisfaction Tool Was Developed
- 7.3 Using the Client Satisfaction Tool: A Focus Group Interview
- 7.4 Select the Sample
- 7.5 Preparing for the Interview
- 7.6 Interviewing Clients
- 7.7 Analyzing the Data
- 7.8 Scheduling
- 7.9 Guide to Appendices

➔ 7.1 Client Satisfaction Tool

Type of tool:

Qualitative

Overview:

The Client Satisfaction Tool is a focus group interview tool that will help users learn the extent to which clients are satisfied with the program and what specific changes would better meet their needs.

Hypotheses tested by this tool:

None. This tool focuses on client satisfaction and provides information targeted to improving the program rather than identifying its impacts.

Purpose:

The purpose of the Client Satisfaction Tool is to:

- Determine client satisfaction with program products and services; and
- Solicit client suggestions for improving the program.

Amount of time required to administer the tool:

120 minutes (2 hours)

Source:

Original Version: Nancy Horn, Friend of SEEP

Revisions: Members of the AIMS-SEEP tools team and other practitioners

Client Satisfaction "Likes-Dislikes" Reporting Matrix

Group No. _____ Members in Group _____ Center _____ Branch _____
 Facilitated by: _____ Assisted by: _____ Date _____ Time _____
 Program Element _____

Current Practice	What Clients Like About It?	What Clients Dislike About It?	Recommendation for Improvement?	Why?	Number Voting for Change

Completed Example, ASHI 2000

Current Practice	What Clients Like About It?	What Clients Dislike About It?	Recommendation for Improvement?	Why?	Number Voting for Change
Group Formation	<ul style="list-style-type: none"> That a group of 1-5 mothers can have capital helps with school expenses and the family. 	<ul style="list-style-type: none"> It took long before we got our release We do not like the repeated training. 	<ul style="list-style-type: none"> Disburse loans within 5 days. 	<ul style="list-style-type: none"> So that there is not a lot of wasted time for members and staff. 	<ul style="list-style-type: none"> 17

Summary of Client Satisfaction Reporting Matrices

Total Number of Groups Interviewed _____

Total Number of Participants _____

Program Element	What Clients Like?	# of Grps	What Clients Dislike?	Recommendations To Improve?	# of Grps	Why?
Loan Size						
Interest Rate						
Loan Term						

Program Element	What Clients Like?	# of Grps	What Clients Dislike?	Recommendations To Improve?	# of Grps	Why?
Savings (amt. & frequency of deposit)						
Access to Savings						
Frequency of Meetings						

⇒ 7.2 Why the Client Satisfaction Tool Was Developed

Some experts are satisfied with indicators of client satisfaction that are fairly easy to measure such as frequency of leaving the program and/or sustained participation. But given the dual aim of proving and improving programs, the AIMS-SEEP team felt that managers and staff of microfinance programs would want to maximize their understanding about how their clients are reacting to the program's policies and services. Seeking the opinions of clients themselves is perhaps the best way to get this information. In so doing, this tool serves as a reality check to determine if the program is indeed meeting clients' needs. And if it is not, the tool will help identify what specific aspects are not working as well as they could. Program managers have been surprised by what they have learned from this tool: Some have found that staff are not following stated program procedures; others have learned that the program's training has not been effective; one program was surprised to hear clients asking for more contact with program staff.

⇒ 7.3 Using the Client Satisfaction Tool: A Focus Group Interview

This tool asks clients to consider what they like and don't like about the lending program of the organization, and offers them an opportunity to voice their suggestions for improving it. (See the cautionary note in Figure 7-1.) The method for implementing the Client Satisfaction Tool follows a traditional focus group format. This method focuses on identifying what clients like and dislike about each element or feature of the lending methodology. Participants are each given a card with one program element written on it. In turn, each participant describes the element as currently practiced, comments on what she likes about it, and makes a suggestion for how to improve it. Then the discussion of this element is opened to comments from the whole group. The focus group method outlined here includes an optional voting process on program likes and dislikes. The guidelines below include step-by-step instructions for selecting focus group participants, preparing for the focus group interviews, conducting the interviews and analyzing the data.

The key to a successful focus group interview is the management of the group discussion. An interviewer must be able to do the following:

- Make clients feel comfortable in voicing their opinions in a group environment;
- Get everyone to participate;
- Keep the discussion flowing; and
- Obtain the information needed in a limited time.

FIGURE 7-1.
Cautionary Note

Going to clients and asking their opinion about how to improve the program can raise expectations that their suggested changes will be made. In some instances, clients have complained that their suggestions are never taken seriously and such discussions are therefore a waste of time. Yet, credit methodologies, program policies and operational procedures are often based on a variety of factors that clients do not always know about or understand, such as risk management and cost control. In other words, program managers may have very good reasons for NOT adopting changes suggested by clients. If this is the case, the evaluation team should be prepared to explain that the information will be helpful to management even if it is not possible to make all of the changes that clients request. One group in Peru avoided raising expectations by introducing the exercise as an advisory session during which clients were asked to offer advice for a new program starting in another part of the country.

A second note of caution regards staff behavior during this focus group discussion. During field tests, the staff has had a tendency to intervene and defend program policies in the face of client criticism. This interrupts the process and should not happen; to avoid it, interviewers must be coached before the interview and observed during the interview.

➡ 7.4 Select the Sample

This tool seeks information on client satisfaction with specific aspects of the program that can help management determine what changes, if any, should be made. Because the data collected can directly affect the entire lending program, it is important to talk to clients who represent the program population. There is no standard number of groups or percentage of the client population that should be interviewed. You should hold focus group discussions until no new information is gained. Figure 7.2 provides sample sizes for this tool from three impact assessments conducted in 2000.

As with any sample, you must choose the client characteristics that you feel are most important in defining it. Is it important to have both men and women, rural and urban clients represented? Your organization may wish to compare/contrast client satisfaction in different geographic locations, with those under the supervision of different branch offices, with clients engaged in different types of businesses (for example, manufacturers vs. traders vs. service providers). After choosing these characteristics, select individual clients or groups that represent those categories.

The second challenge in designing your selection of focus groups is composing the groups themselves. You can either invite different individuals to form special groups for the purpose of this evaluation, or you can interview existing peer groups.

Chapter 7

If applying this tool to an individual lending program, you have to invite individuals to join groups. Focus groups work best if their participants (1) have specific knowledge about the topic to be discussed; (2) feel comfortable in sharing that knowledge in a small group setting; (3) can engage in a discussion on aspects of this knowledge, and (4) can demonstrate mutual respect in allowing others to speak. “Qualified” group participants should be clients who have these qualities, as well as those who are representatives of a sub-population of clients (for example, rural vs. urban, male vs. female, and group lending vs. individual lending).

For impact assessments of group lending programs, existing solidarity groups or village banks can become a focus group. As with individuals, the groups you choose to include should be identified by the characteristics you want to learn about as well as by (1) geographic distribution; (2) industry distribution, if all members of a group participate in the same industry; (3) repayment status; and (4) relationship with loan officer. For instance, having chosen a group with a high arrears rate, you might learn that members dislike the infrequency of visits by the loan officer. By using probing questions during the discussion, you may find out that, feeling neglected, group members are less committed to consistent loan payments.

FIGURE 7-2. Illustrative Sample Sizes for Client Satisfaction Focus Groups					
Organization	Location	Selection Criteria	Number of Focus Groups	Total number of clients	Avg.number of clients/group
ASHI	Philippines (Luzon)	Geographic: • Rural • Semi-urban • Island	11	214	19
FINCA/Peru	Lima, Peru	District of residence (to represent all areas of prog. operation) Time in program (new & mature clients)	13	192	15
Foundation 4i-2000	Nicaragua (Masaya, Grenada)	Areas of program operation Rural clients	12	120	10

➔ 7.5 Preparing for the Interview (P)

Step P - 1: Get To Know the Program Methodology

You must be very knowledgeable about the different financial and non-financial services offered by the organization. As users of these services, clients may identify any aspect of the program with which they are dissatisfied and you should understand what they are talking about. If you are familiar with all aspects of the products, services and methodologies for delivering them, you can be quick to respond to clients with valuable follow-up questions during the focus group interview.

In those programs offering multiple loan products, it is possible that loan officers working with one product will be assigned to interview clients using a different product. In such cases, staff will have to thoroughly learn the “other” product. For instance, if group lending includes products such as savings or insurance, or fees for infractions of group rules, you must be prepared to talk about these topics if they arise in the discussion. Similarly, if an individual lending program requires a client to write post-dated checks to make repayment, you must understand this system even if it is not used in the program’s group lending component. You the interviewer must be prepared to explain any differences in the way the program is implemented from one group or individual to another—what they are and why they exist.

Step P - 2: Get To Know Each Sub-Population of Clients To Be Interviewed

You will also find it helpful to know each sub-population selected for the interview. If, for example, you are interviewing a group of rural villagers, you should find out if they have difficulties repaying their loans due to the timing of the agricultural cycle. Similarly, a group of manufacturers must purchase raw materials, manufacture their product, market it and wait for payment before they can repay their loans. The delay built into this type of business cycle might lead them to request a grace period.

Step P - 3: Make Logistical Arrangements To Conduct the Focus Group Interview

If the entire membership of a village bank or solidarity group has been chosen to participate in a focus group, arrange to conduct the interview during a time when they normally meet. You should explain the goal of the activity to the group leader and mention that the meeting may take longer than their normal meetings do. The leader can then inform the group members in advance to plan for a slightly longer group meeting.

If arranging focus groups composed of either individual loan clients or individuals selected from different borrower groups, you must do the following:

- Issue invitations and clearly communicate what is expected of participants;
- Find a time that is acceptable to the majority of selected clients;
- Arrange for a meeting place and transportation to that place; and
- Plan to offer refreshments and/or other incentives. (For example, pay the cost of transport to the meeting place if clients are coming for an extra meeting. Either give the village bank leaders money to purchase refreshments, or bring them with you.)

Step P - 4: Select the Program Elements That You Want Clients to Discuss and Prepare

Program managers should select those program elements for which client feedback will be most useful. In order to keep the meeting to a reasonable length, limit the number of elements to be discussed. Experience with this tool indicates that six to eight elements should be the maximum. Plan out how the interview will be conducted and prepare some probing questions (to serve as a resource in case you cannot think of anything). Work with the person who will accompany you to serve as recorder, making sure s/he understands what information is to be recorded and how. Finally, practice using the tool with a simulated focus group, as described in the training exercises in Appendix 7.1 located on the CD accompanying this manual.

➔ 7.6 Interviewing Clients using a Focus Group Method (I)

Step I - 1: Introduce the Session

Introduce yourself and the recorder to the group and ask participants to introduce themselves. Explain that the purpose of this session is to seek clients' opinions on what they like and dislike about the program. Explain that this information will help others design better lending programs in the future. Assure everyone that their names will not be attached to the points they raise and that the discussion today will in no way affect clients' ability to participate in the program.

Step I - 2: Warm Up

To get the clients accustomed to discussing what they like and dislike about the program, begin with a discussion of some other aspect of their life, something very familiar. For each topic, ask what they like and what they dislike. Work with your team to think up good topics for this warm-up exercise. Suggested topics are the following:

- Sundays;
- Soccer matches;
- Market day in their town; or
- School holidays.

Step I - 3: Define the Topics for Discussion

Give each group participant a pre-made card that has on it the name and/or a symbol for one program element, such as interest rate, loan term, loan amount, repayment frequency, training, or supervision by promoters. If the group is large, more than one person may have a card with the same element on it.

NOTE: The items put on the cards and listed in the "Client Satisfaction Reporting Matrix" should be determined by the program manager in accordance with the program being evaluated. It is expected that these items will vary by program and by organization. This list should be limited to 6-8 elements. Otherwise the focus group discussion will be too long.

Show a flip chart with all these program aspects listed (along with the corresponding symbols if they are used) and review each item with the group to make sure everyone understands the meaning of the aspects to be discussed. The recorder or another client should be assigned to help those participants who have difficulty reading.

Step 1 - 4: Describe Program Elements

Starting with the first program element on the list, the interviewer should then ask the person who has this element on his or her card to describe for everyone how that element operates in the present program. Invite other participants with the same card to contribute to explaining the program element as may be necessary to complete the description of its specific features.

Step 1 - 5: Determine Likes, Dislikes, and Recommendations for Improvement

Display a flip chart with five columns labeled as follows:

- Program Element;
- Like About Element;
- Dislike About Element;
- Recommended Changes; and
- Why?

You will probably need one flip chart for each program feature. (In addition to the flip chart process, the recorder should be documenting the group's recommendations and comments using the Client Satisfaction Reporting Matrix. If the flip chart option is not available, the recorder must be sure to write down *everything* that is said, and provide feedback to the group by reading what s/he has written to confirm its accuracy.)

Ask the cardholder to indicate whether there are any aspects of this program feature that s/he likes, and if so, to identify what these are. The recorder should list these "likes" in the appropriate column on the flip chart for all to see. If another person has the same card, ask that person the same question.

Next, ask the cardholder how this program feature could be improved and why. Write her response on the appropriate column on the flip chart. Invite those with the same feature on their cards to add their comments. Open the discussion about this feature to the rest of the group.

Ask: Does everyone agree with this suggestion? Does anyone have a different idea?

Continue with the same process for each card distributed and until all program features on the list have been presented and discussed.

Step I - 6: Take a Break!

After an hour, stop the discussion and take a break. Clients may need to attend to children or visit the bathroom. Offer refreshments at this time.

Step I - 7: Summarize

After everyone has finished, summarize the conclusions for the group as you have heard them. Ask if anything was left out of the summary. Then thank participants for their time. Affirm that their opinions are important to the program and will be taken into consideration by the program managers as they consider how they can make the program more client-focused and improve its services.

OPTION: Focus Group with a Nominal Group Voting Process

The nominal group voting process in this tool is an optional step to determine how many people agree with the recommendations for change identified in the focus group discussion. (See the cautionary note in Figure 7-3.) Because the information gathered during these focus group discussions can influence program adjustments, management may want to know exactly how many of each client group want the changes to take place. Whether or not you use the voting process explained here will depend on how important this numerical count is to program management.

FIGURE 7-3 - Caution on Nominal Group Voting

Conducting a voting process in a group context can be tricky. Because of the nature of group interaction, certain clients often emerge as “opinion leaders” and the rest, the followers, will agree with what the leaders say and vote accordingly. It is very important to convince clients that they are free to contribute to the discussion and NOT simply follow what someone else in the group does. In addition, people often hesitate to be negative.

Step 1: Conduct the Focus Group Interview

Conduct the same focus group discussion described above, but explain that at the end of the discussion, participants will vote for the program changes they want. Stress that all must vote individually without regard to what others in the group might say.

Step 2: Vote

After the likes, dislikes, and recommendations have been recorded, conduct a vote on each of the recommendations for change. You can do this at either of the following two junctures:

- After each recommendation has been identified; or
- After all recommendations have been identified.

If you choose the latter, you might give clients a minute to consider whether they want to add any other recommendations. Write any new ones on the flip chart list. When everyone is satisfied that the list is complete, ask participants to review it and pick those they really agree with. Two voting procedures are explained below:

After each recommendation has been identified

Pass out two cards to each participant. Cards should be coded with either numbers (“0” for disagree and “1” for “agree”) or colors (for example, green for “agree” and red for “disagree”). Tell clients that if they agree with this recommendation, they should hold up the “agree” card; if they do NOT agree with the recommendation, they should hold up the card with the “disagree” card (as identified by either a color or number).

Explain the following three requirements for voting:

Chapter 7

- For each recommendation, they can only vote one way and hold up only one card;
- When voting, no one is allowed to look at another person's cards, so all eyes must be focused up front; and
- Counting the votes is necessary for management to understand the strength of the responses.

Read aloud one program/practice recommendation and ask everyone to vote by showing the appropriate agree/disagree card.

The recorder counts the votes, and records them in the last column of the Client Satisfaction Reporting Matrix.

After all recommendations have been identified

Another way to vote is by writing all recommendations on a board or flip chart. Ask participants to come forward and mark those with which they agree. Alternatively, they can pick their top three priorities from the list and mark each accordingly with numbers (1, 2, 3) to indicate their order of priority.

It is possible that all clients feel very comfortable with each other and would be able to vote independently by a show of hands. While this less anonymous method of voting may work in certain cultural settings, in others it is possible that an "opinion leader" may set the tone and expect others to vote in the same way.

Another alternative to voting by show of hands is to post a list of the suggested program changes and ask participants to check those with which they agree; this process is less personal, more anonymous.

➔ 7.7 Analyzing the Data (A)

The data analysis process recommended for this research entails the following four main steps, listed and explained below: (1) transcribe all data from the individual matrices to the Summary of Client Satisfaction Reporting Matrices, (2) study the summary matrices and tally the results, (3) write the analysis, and (4) share the findings.

Step A - 1: *Transcribe All Data from the Individual Matrices to the Summary of Client Satisfaction Reporting Matrices*

At the end of each day, or right after returning from the interviews, transcribe all the information gathered on the individual matrix onto the Summary of Client Satisfaction Reporting Matrices. (See the example in Figure 7-4.) The facilitator and the recorder should work together on this task and should be able to attribute specific likes/dislikes and recommendations to a particular group. Having every group's comments on each of the program aspects covered during the focus group sessions will be helpful in writing up the findings.

Step A - 2: *Study the Summary of Client Satisfaction Reporting Matrices and Tally the Results*

Look at how all of the groups reacted to each program feature. List all the specific "likes" and "dislikes" from all groups on the Summary of Client Satisfaction Reporting Matrices and tally the number of groups that cited each one. The examples in Figures 7-5 and 7-6 show how this information can be summarized and reported.

F IGURE 7-4.
Summary of Client Satisfaction Reporting Matrices

Program Element	What Like?	Number of Groups (Which Groups)	What Dislike?	Recommendations to Improve	Why ?	Number of Groups (Which Groups)
Frequency of Meetings	Liked current spacing	3 (2,4,5)	Thought meetings were too frequent	Change frequency to every 2 mos.	Allow for smaller weekly loan repayment	3 (1,3,6)
Supervision	Frequency	2 (2,5)	Visits not frequent enough	Visit more often	More support and training is needed	4 (1,3,4,6)
Loan Amounts	Amounts currently given	4 (1,2,5,6)	Amounts too small	Increase size of maximum loan	Able to use larger amounts than the ceiling amounts set for each loan cycle	2 (3,4)
Training	Frequency and topics	3 (3,4,6)	Too infrequent, topics not comprehensive enough	More diversity in training topics	Current training does not meet clients' needs	3 (1,2,5)
Interest Rates	Approved of current level	2 (1,2)	Too high	Lower rate	Difficulty in paying loan	4 (3,4,5,6)
Savings	Forced savings component	4 (2,4,5,6)	Amount of forced savings too high	Lower amount	Funds not accessible	2 (1,3)

FIGURE 7-5.- Summarizing and Reporting Likes/Dislikes		
83 percent (5 of 6 groups)	Liked the	Internal rules of the program
50 percent (3 of 6 groups)	Liked the	Monthly meetings of village banks
67 percent (4 of 6 groups)	Liked the	Current method of client selection
67 percent (4 of 6 groups)	Liked the	Loan amounts being given now
50 percent (3 of 6 groups)	Liked the	Way the loans are being disbursed now
50 percent (3 of 6 groups)	Liked the	Method of payment of the loans
67 percent (4 of 6 groups)	Liked the	Obligatory savings
67 percent (4 of 6 groups)	Disliked the	Current low level of loan supervision (too low)
67 percent (4 of 6 groups)	Disliked the	Current high interest rates (too high)
50 percent (3 of 6 groups)	Disliked the	Current level and content of training

Note: This chart only summarizes what clients actually mentioned in the focus group. Don't assume that remaining clients felt the opposite. (e.g., you **can't** assume that because 83% of the groups liked internal rules of the program, 17% did not like those rules.)

Now analyze which groups “liked” or “disliked” a program feature:

- What do they have in common?
- Do the same groups tend to like and dislike the same program features? Are their reasons for disliking a feature similar, or different? Are their recommendations similar?
- If a majority makes the same recommendation, what does that tell you about how clients are reacting to the program?
- What stories did you hear during the focus group discussion that can strengthen your finding?

FIGURE 7-6.
Client Satisfaction in Mali

Finding: Clients appreciated Kafo's flexibility in setting meeting schedules based on clients' desires.

All six focus groups reported their satisfaction with the frequency of their credit association meetings. In response to members' requests, Kafo Jiginiew has been flexible about the frequency of meetings which varies according to the season and clients' recommendations.

By grouping client stories to illustrate the strength or weakness of a finding, comparing client responses in different categories, and grouping clients with similar characteristics, you can determine whether specific likes or dislikes are held by most clients or by only one type of group. If it is the latter, try to identify which characteristics of this particular group explain its unique reaction.

Step A - 3: Write the Analysis

Write the analysis in narrative form. As much as possible, use direct quotes and anecdotes from clients. (See the example in Figure 7-7.)

FIGURE 7-7.

Client Responses and Recommendations for ASHI on its Group Fund

ASHI clients make a mandatory, weekly deposit into the Group Fund Savings, which are then available for loans to members on a limited basis. Client feedback on this program element is as follows:

Dissatisfaction with the Group Fund Savings is focused on the policy that allows only one member to borrow from the fund at a time. A second borrower has to wait until at least 60% of the first loan has been repaid.^Z Clients say that this policy defeats the emergency purpose for which the fund was set up. Furthermore, loans are limited to medical expenses, and a doctor's prescription must first be presented before funds can be released. Yet, clients claim that they don't have the money to go to the doctor first to obtain the required prescription. Clients also complain that limiting the fund's usage to medical emergencies ignores other immediate family or business needs. Finally, when larger amounts are needed (Ps. 1,000 or more), it takes too long to get the money, especially when they are faced with an emergency. This is why, clients explain, they tend to borrow only up to Ps. 900 (Data from the Use of Loans, Profits and Savings Over Time Tool confirmed this trend).

Recommendations:

- Allow more than one to borrow at a time, especially in the case of emergency.
- Allow loans from the Group Funds Savings to be used for other immediate cash needs.
- Do not require a doctor's prescription, medical certificate, or receipts of medicines purchased prior to loan disbursement.
- Streamline the process of loan approval and disbursement for loans over Ps.1,000.

Source: "Poverty Reduced Through Microfinance: The Impact of ASHI in the Philippines". Edited by Helen Todd. CASHPOR Technical Services, August 2000.

Step A - 4: Share the Findings

It is important to have at least one other person, but preferably two other people, read through your findings to verify that others agree with you and to ensure that nothing is left out.

➔ 7.8 Scheduling

Using the Client Satisfaction Tool involves tasks in the three phases explained above:

(1) Preparing for data collection, (2) Interviewing clients (data collection), and (3) Analyzing data. The approximate amount of time required for each task is offered in Figure 7-8. This example is based on 12 focus groups with 10 participants each for a total of 120 clients. (Generally, a village bank has between 20 and 35 members. Ten members are selected from each bank to be part of the focus group.) Two interviewers (one person to facilitate and one to record) conduct two focus groups per day for a total of twelve in six days. The whole process requires about three weeks. People with some university training make better qualitative interviewers for this tool because of the skill requirements for leading a group interview, recording a large amount of information, and consolidating that information from multiple groups.

Figure 7-8 Applying the Tool: Tasks and Time Required			
Tasks	Time	Personnel	Observations
Preparation			
<ul style="list-style-type: none"> Decide objectives and goals for tool. Select 6-10 program characteristics for the clients to evaluate. Decide on which types of clients to interview. 	.5 day	Program management & Assessment Coordinator	Select clients for participation in the focus groups who have been in the program long enough to know it well and have opinions about its features. You may choose to select some groups of fairly new clients and some groups of older clients, as they will have different opinions.
Train interviewers.	1 day	Trainer & interviewers	Time will vary by the skills and experience of interviewers (See training exercises for this tool on the CD.)
Prepare materials		Trainer & interviewers	<u>Flip chart paper and markers</u> <u>Set of cards</u> - Two cards for each feature to be evaluated x 12 focus groups. <u>Colored Cards</u> - (one color for yes and one for no) for nominal vote.
Field test the tool twice in a long morning. Debrief in the afternoon.	1 day	Team of two: one facilitator and one recorder.	The trainer could attend as an observer. The tests will indicate how long the interview takes and give the interviewers practice and confidence.

Figure 7-8
Applying the Tool: Tasks and Time Required

Tasks	Time	Personnel	Observations
Select the sample of 12 banks and 10 persons from each to participate in focus groups.	0.5 day	Trainer and one staff Or Manager	Use members' bank records to help select the individuals who will be invited to join the focus group.
Complete Information Form for each communal bank in the sample	1 day	The interview team(s)	Each bank form takes one hour to complete—requires 12 hours total. A team of two can complete in 6 hours.
Schedule the interviews with focus groups; Plan for logistical needs (e.g., transport).	1 day	Two interviewers, or normal staff with advice from trainer/consultant	Team can conduct two focus groups per day (morning and afternoon), allowing time for travel & write-ups. Plan time for traveling the distance between the client's location and the office, as well as between groups.

Client Interviews (Data collection)			
Conduct focus group interviews. Review notes and write in additional information.	6 days for 12 focus groups (90 to 120 min each)	2 interviewers 1 quality control in office	Save time by having a secretary type up the field notes into the matrix while the interviewers are still in the field so that they can review quickly and add information taken from interview tapes. Review field notes at end of each day.
Data Analysis			
Complete single matrix per focus group; Create summary matrix for the 12 focus groups.	1.5 days	2 interviewers; 1 quality control person	Do this as close to the actual interviews as possible, preferably at the end of each day of interviewing. Faster to review what typist has done in transcribing to matrix in MS Word
Create data tables.	1.5 days	2 interviewers 1 person to review work	Compare suggestions for changes to current practices.
Analyze data for patterns, trends, themes.	1.0 day	2 interviewers with one supervisor	
Write report.	1.5 days	2 interviewers & one supervisor	If interviewers are not comfortable writing narrative, delegate report to supervisor.
TOTAL DAYS	16.5 days (done in 3 weeks)	For each of two interviewers and supervisor	

➔ 7.9 CHAPTER 7 - APPENDICES

The following appendices provide useful information to complement the material in the chapter. Many documents were developed in the field and may make the field work in AIMS-SEEP types of evaluations much easier for you.

These appendices are located on the CD-Rom inside the folder, “**Manual – Chapter 7.**”

Appendix Number	Document Title/Description	# of Pages	Filename
7.1	<i>Training Clients to Use the Client Satisfaction Tool;</i> This document presents several training exercises that the evaluation supervisors or team leaders can use to train staff in applying the Client Satisfaction Tool. Each exercise corresponds to one of the focus group methods outlined in the chapter; consequently, your choice of method will determine which of the training exercises is relevant for your team.	8	App. 7.1 – Client Sat. Training.doc
7.2	<i>Client Satisfaction Reporting Matrix;</i> An example of a completed Client Satisfaction Reporting Matrix from ASHI IA 2000.	5	App. 7.2 - Client Satisf Reporting Matrix-Sapang.doc