

PILOT ASSESSMENT GUIDE		
ASSESSMENT AREA	KEY QUESTIONS	SOURCES OF DATA
Market acceptance / Customer receptivity	<ul style="list-style-type: none"> How well did the clients, guardians / parents, facilitators and partners respond to the program (product, financial education, marketing, etc.)? What were the take-up and usage numbers? How effective was the marketing and financial education? 	Account take-up and usage data
		Client interviews
		Client focus groups
		Guardian / parent (of client) interviews
		Financial education participant interviews
		Financial education facilitator interviews
		Financial education guardian / parent (of participant) interviews
Staff implementation	<ul style="list-style-type: none"> How well did staff perform during the pilot? What was staff and branch productivity during the pilot? Were the pilot objectives met? Did staff adhere to the pilot budget? If not, why? 	Marketing and financial education responsiveness and conversion rates
		Pilot branch staff interviews
		Head office staff interviews
		Training manuals
		Process maps
		Actuals vs targets
		Pilot objectives
Systems performance	<ul style="list-style-type: none"> How well was pilot data captured and reported? Was the back-office processing and operations efficient? 	Actual vs estimated pilot budget
		Data reporting
		MIS capability
		Process maps
		Policies & procedures