

Client Satisfaction Survey

This survey was adapted from an internal client satisfaction tool originally used by SEF. It has been revised to serve as a **universal reference** for financial service providers seeking to measure client satisfaction, improve product design, and strengthen transparency and customer care. The questions are flexible and can be adjusted to different institutional contexts, data collection methods, or target audiences.

Key words: Client satisfaction survey, customer feedback, product quality, customer experience

Section1: Basic Information

- 1) Type of survey:
 - a. By phone
 - b. In-person
 - c. Online
- 2) Zone / Region: _____
- 3) Branch / Office: _____
- 4) Group Name or Client ID: _____
- 5) Product Type:
 - a. Individual Loan
 - b. Group Loan
 - c. Savings
 - d. Other: _____
- 6) Date of Interview: _____
- 7) Interviewer's Name / Code: _____

Section 2: General Satisfaction Questions

- 8) Overall, how satisfied are you with the institution's services?
 - a. Satisfied
 - b. Neutral
 - c. Unsatisfied
 Comments: _____
- 9) How satisfied are you with your current financial provider (e.g., bank, MFI, cooperative)?
 - a. Satisfied
 - b. Neutral
 - c. Unsatisfied
 - d. I don't use other providers
 Comments: _____

Section 3: Savings and Loans Products

- 10) How satisfied are you with the savings requirements or conditions?
 - a. Satisfied
 - b. Neutral
 - c. Unsatisfied
 Comments: _____
- 11) Would you prefer individual or group savings?
 - a. Individual
 - b. Group
 - c. No preference
 Comments: _____
- 12) How satisfied are you with your loan term (duration)?

- a. Satisfied
- b. Neutral
- c. Unsatisfied

Comments:

13) Would you prefer to choose your loan term individually or as a group?

- a. Individual
- b. Group
- c. No preference

Comments:

14) How satisfied are you with the repayment frequency?

- a. Satisfied
- b. Neutral
- c. Unsatisfied

Comments:

15) How satisfied are you with the way your loan is disbursed?

- a. Satisfied
- b. Neutral
- c. Unsatisfied

Comments:

16) Would you prefer individual or group disbursements?

- a. Individual
- b. Group
- c. No preference

Comments:

17) How satisfied are you with the size of your current loan?

- a. Satisfied
- b. Neutral
- c. Unsatisfied

Comments:

18) How satisfied are you with the requirements for loan increases?

- a. Satisfied
- b. Neutral
- c. Unsatisfied

Comments:

19) How satisfied are you with the timing of repayments during holidays or special periods?

- a. Satisfied
- b. Neutral
- c. Unsatisfied
- d. N/A

Comments:

Section 4: Meetings and Group Participation

20) How satisfied are you with attending group or center meetings?

- a. Satisfied
- b. Neutral
- c. Unsatisfied

Comments:

21) How do you feel about borrowing as part of a group?

- a. Satisfied
- b. Neutral
- c. Unsatisfied

Comments:

22) Do you feel supported by your group members when facing financial or business difficulties?

- a. Yes
- b. Neutral
- c. No

Comments:

23) How do you feel about fines or penalties for lateness or absences?

- a. Satisfied
- b. Neutral
- c. Unsatisfied

Comments:

Section 5: Fairness and Staff Interaction

24) How satisfied are you with your interactions with your loan officer or field representative?

- a. Satisfied
- b. Neutral
- c. Unsatisfied

Comments:

25) Have you ever felt disrespected, intimidated, or pressured by staff?

- a. Yes
- b. Neutral
- c. No

Comments:

26) Has any staff member ever requested extra or informal payments?

- a. Yes
- b. Neutral
- c. No

Comments:

Section 6: Complaints and Client Protection

27) Do you know who to contact if you want to make a complaint?

- a. Yes
 - i. a. If yes, what options do you have?
- b. No

Comments:

28) Do you have a client protection or complaint information card?

- a. Yes
- b. I don't know what that is
- c. No

- i. If no, why not?
 - 1. I never received one
 - 2. I had one but lost it

Comments:

Section 7: Financial Education

29) Have you attended any financial education sessions or trainings provided by the institution?

- a. Yes
- b. No

30) How satisfied are you with the topics covered?

- a. Satisfied
- b. Neutral
- c. Unsatisfied

31) How satisfied are you with the time allocated to these sessions?

- a. Satisfied
- b. Neutral
- c. Unsatisfied

32) Do you use the information learned in your business or household?

- a. Yes
- b. Sometimes
- c. No

Comments

Section 8: Open Feedback

33) What do you value most about this institution?

34) What changes would you like to see?