Doc 5.5. Post-training monitoring and visit forms for microenterprises

**Client Visit Form - Start-up activities**

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Client</td>
<td>Adviser</td>
<td>Business</td>
<td>District</td>
</tr>
<tr>
<td>Travel time</td>
<td>Date</td>
<td>Duration of visit</td>
<td>No. of workers</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Have premises been obtained, paid and agreement signed?</td>
<td>Y/N/N/A</td>
</tr>
<tr>
<td>2 Have licences been acquired?</td>
<td></td>
</tr>
<tr>
<td>3 Is security sufficient?</td>
<td></td>
</tr>
<tr>
<td>4 Developing a marketing plan?</td>
<td></td>
</tr>
<tr>
<td>5 Is all the necessary equipment available?</td>
<td></td>
</tr>
<tr>
<td>6 Are there sufficient supplies?</td>
<td></td>
</tr>
<tr>
<td>7 Adequate storage for equipment and supplies?</td>
<td></td>
</tr>
<tr>
<td>8 Is there an established work schedule?</td>
<td></td>
</tr>
<tr>
<td>9 Are products displayed well?</td>
<td></td>
</tr>
<tr>
<td>10 Known visiting schedule of business/trade adviser?</td>
<td></td>
</tr>
<tr>
<td>11 Is there a clear business sign?</td>
<td></td>
</tr>
<tr>
<td>12 Is work environment appropriate?</td>
<td></td>
</tr>
</tbody>
</table>

Client Signature | Adviser signature
# Client Visit Form - Production

<table>
<thead>
<tr>
<th>Raw materials</th>
<th>Assessment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Are materials available?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>2 Are quantities sufficient?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>3 Are the prices fair?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>4 Is the quality acceptable?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>5 Are materials properly utilized?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>6 Are materials properly stored?</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Tools &amp; equipment</th>
<th>Assessment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>7 Are they adequate?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>8 Are they well maintained</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Production process</th>
<th>Assessment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>9 Do operators have adequate skills?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>10 Is the production process well organized?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>11 Are work schedules in place?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>12 Is product quality acceptable?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>13 Is production quantity acceptable?</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Decent Work</th>
<th>Assessment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>14 Are working conditions safe and healthy?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>15 If there are wage workers, do they have written contracts?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>16 Are the wages set according to laws and regulations?</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>17 Are workers covered by social security, in line with the legal requirements</td>
<td>Y</td>
<td>N</td>
</tr>
<tr>
<td>18 Other:</td>
<td>Y</td>
<td>N</td>
</tr>
</tbody>
</table>

**Comments**
# Client Visit Form - Marketing

<table>
<thead>
<tr>
<th>Client</th>
<th>Adviser</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business</td>
<td>District</td>
</tr>
<tr>
<td>Travel time</td>
<td>Date</td>
</tr>
<tr>
<td>Duration of visit</td>
<td>No. of workers</td>
</tr>
</tbody>
</table>

## Marketing activities

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Knowledge of customers needs?</td>
<td>Y N N/A</td>
</tr>
<tr>
<td>2 Customers seem satisfied?</td>
<td>Y N N/A</td>
</tr>
<tr>
<td>3 New customers prospected?</td>
<td>Y N N/A</td>
</tr>
</tbody>
</table>

## Product

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4 Is the quality acceptable?</td>
<td>Y N N/A</td>
</tr>
<tr>
<td>5 Is the quantity sufficient?</td>
<td>Y N N/A</td>
</tr>
<tr>
<td>6 Is the product effective?</td>
<td>Y N N/A</td>
</tr>
<tr>
<td>7 Are people buying more or less?</td>
<td>Y N N/A</td>
</tr>
</tbody>
</table>

## Business

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8 Is the location suitable?</td>
<td>Y N N/A</td>
</tr>
<tr>
<td>9 Are people aware of the location?</td>
<td>Y N N/A</td>
</tr>
</tbody>
</table>

## Pricing

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>10 Are prices acceptable?</td>
<td>Y N N/A</td>
</tr>
<tr>
<td>11 Are prices competitive?</td>
<td>Y N N/A</td>
</tr>
<tr>
<td>12 Is the profit margin sufficient?</td>
<td>Y N N/A</td>
</tr>
</tbody>
</table>

## Promotion / Advertising

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>13 Do customers have knowledge of product(s)?</td>
<td>Y N N/A</td>
</tr>
<tr>
<td>14 Is a sign board in place?</td>
<td>Y N N/A</td>
</tr>
<tr>
<td>15 Are products well presented??</td>
<td>Y N N/A</td>
</tr>
<tr>
<td>16 Are products easily available?</td>
<td>Y N N/A</td>
</tr>
<tr>
<td>17 Are sample products available for display?</td>
<td>Y N N/A</td>
</tr>
</tbody>
</table>

## Other:

### Comments

Client Signature

Adviser signature
Client Visit Form - Finance

<table>
<thead>
<tr>
<th>Assessment</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration and Marketing</td>
<td>Y</td>
</tr>
<tr>
<td>1  Is record keeping up to date?</td>
<td>N</td>
</tr>
<tr>
<td>2  Is there a cash book?</td>
<td>N/A</td>
</tr>
<tr>
<td>3  Is the cash book up to date?</td>
<td>Y</td>
</tr>
<tr>
<td>4  Are all business transactions recorded?</td>
<td>N/A</td>
</tr>
<tr>
<td>5  Is there sufficient working capital?</td>
<td>N/A</td>
</tr>
<tr>
<td>6  Is there a recent budget?</td>
<td>Y</td>
</tr>
<tr>
<td>7  Is the budget followed?</td>
<td>N</td>
</tr>
<tr>
<td>8  Are products costed?</td>
<td>N/A</td>
</tr>
<tr>
<td>9  Does pricing allow for sufficient cash flow?</td>
<td>Y</td>
</tr>
<tr>
<td>10 Other</td>
<td>N/A</td>
</tr>
<tr>
<td>Credit / Debit</td>
<td>Y</td>
</tr>
<tr>
<td>11 Is the loan being repaid?</td>
<td>N</td>
</tr>
<tr>
<td>12 Are creditors promptly paid?</td>
<td>N/A</td>
</tr>
<tr>
<td>13 Is loan repayment up to date?</td>
<td>Y</td>
</tr>
<tr>
<td>14 Has rent been paid?</td>
<td>N</td>
</tr>
<tr>
<td>15 Are workers paid on time?</td>
<td>N/A</td>
</tr>
<tr>
<td>16 Are debtors paying on time?</td>
<td>Y</td>
</tr>
<tr>
<td>17 Are there outstanding debts that cannot be covered by forecasted future cashflows?</td>
<td>N/A</td>
</tr>
<tr>
<td>18 Other:</td>
<td>N/A</td>
</tr>
<tr>
<td>Comments</td>
<td></td>
</tr>
</tbody>
</table>

Client Signature                  Adviser signature