

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

### Client Visit Form - Start-up activities

Client	Adviser
Business	District
Travel time	Date
Duration of visit	No. of workers

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

Client Signature	Adviser signature
------------------	-------------------



## Client Visit Form - Production

Client	Adviser
Business	District
Travel time	Date
Duration of visit	No. of workers

		Assessment	Action		
			Y	N	N/A
<b>Raw materials</b>					
1	Are materials available?				
2	Are quantities sufficient?				
3	Are the prices fair?				
4	Is the quality acceptable?				
5	Are materials properly utilized?				
6	Are materials properly stored?				
<b>Tools &amp; equipment</b>					
7	Are they adequate?				
8	Are they well maintained				
<b>Production process</b>					
9	Do operators have adequate skills?				
10	Is the production process well organized?				
11	Are work schedules in place?				
12	Is product quality acceptable?				
13	Is production quantity acceptable?				
<b>Decent Work</b>					
14	Are working conditions safe and healthy?				
15	If there are wage workers, do they have written contracts?				
16	Are the wages set according to laws and regulations?				
17	Are workers covered by social security, in line with the legal requiremen				
18	Other:				
<b>Comments</b>					

Client Signature	Adviser signature
------------------	-------------------

## Client Visit Form - Marketing

Client	Adviser
Business	District
Travel time	Date
Duration of visit	No. of workers

		Assessment	Action		
			Y	N	N/A
<b>Marketing activities</b>					
1	Knowledge of customers needs?				
2	Customers seem satisfied?				
3	New customers prospected?				
<b>Product</b>					
4	Is the quality acceptable?				
5	Is the quantity sufficient?				
6	Is the product effective?				
7	Are people buying more or less?				
<b>Business</b>					
8	Is the location suitable?				
9	Are people aware of the location?				
<b>Pricing</b>					
10	Are prices acceptable?				
11	Are prices competitive?				
12	Is the profit margin sufficient?				
<b>Promotion / Advertising</b>					
13	Do customers have knowledge of product(s)?				
14	Is a sign board in place?				
15	Are products well presented??				
16	Are products easily available?				
17	Are sample products available for display?				
18	Other:				
<b>Comments</b>					

Client Signature	Adviser signature
------------------	-------------------

## Client Visit Form - Finance

Client	Adviser
Business	District
Travel time	Date
Duration of visit	No. of workers

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

Client Signature	Adviser signature
------------------	-------------------