### Step 1: Understand Your Needs

<table>
<thead>
<tr>
<th>1.1. Pinpoint Challenges</th>
<th>1.2. List Required Features</th>
</tr>
</thead>
</table>
| **Action:** Schedule a meeting with VSLA members, NGO staff, and local tech experts.  
  - **How:** Use a calendar tool to find a common time slot for all participants.  
  - **Objective:** To identify the problems the digital tool needs to solve.  
  - **Why:** Knowing the problems helps you find the right solutions.  
  - **Method:** Use Human-Centered Design techniques like interviews or surveys.  
  - **How:** Prepare a set of questions or a simple survey form to capture user needs and challenges. |
| **Action:** Summarize the key features from the brainstorming session.  
  - **How:** Create a document and list down all the features discussed.  
  - **Objective:** To have a clear list of essential functionalities.  
  - **Why:** A list helps in comparing and evaluating tools.  
  - **Method:** Use the MoSCoW method to prioritize features.  
  - **How:** Label each feature as Must-have, Should-have, Could-have, or Won’t-have. |
Step 2: Who Should Be Involved?

- **Action:** Invite key personnel like IT specialists, project leaders, and decision-makers.
  - **How:** Send out formal invitations via email or a project management tool.
- **Objective:** To have diverse perspectives for a balanced evaluation.
  - **Why:** Different people see different aspects of a problem.
- **Method:** Form a balanced team.
  - **How:** Ensure the team has members with technical, managerial, and user experience expertise.

Step 3: Explore Local Options

3.1. Search Locally

- **Action:** Look for locally developed or popular tools.
  - **How:** Use search engines, ask for recommendations, and consult local directories.
- **Objective:** To find tools that are locally compliant and supported.
  - **Why:** Local tools often have better support and compliance with local regulations.
- **Method:** Keep a spreadsheet.
  - **How:** List down the tools, their features, costs, and any other relevant information for comparison.

3.2. Create a Preliminary List

- **Action:** Compile your findings into a list.
  - **How:** Use the spreadsheet to organize the information.
- **Objective:** To prepare for the initial evaluation.
  - **Why:** A list makes it easier to compare and discuss options.
- **Method:** Use a scoring system.
  - **How:** Assign scores to each tool based on how well they meet your listed features and needs.
### Step 4: Initial Screening

#### 4.1. Match Features
- **Action:** Compare the tools against your feature list.
  - **How:** Use the spreadsheet to cross-reference features.
- **Objective:** To eliminate tools that don't meet basic needs.
  - **Why:** No need to spend time on tools that won't work.
- **Method:** Use a weighted scoring system.
  - **How:** Give more points to Must-have features and fewer points Could-have features.

#### 4.2. Additional Criteria
- **Action:** Evaluate tools based on cost, scalability, and user-friendliness.
  - **How:** Add these criteria to your spreadsheet and score each tool.
- **Objective:** To ensure the tool is practical for your setting.
  - **Why:** The best tool is one that fits your budget and can grow with you.
- **Method:** Use a scorecard.
  - **How:** Create a table where you can rate each tool against each criterion.

### Step 5: Local Tools First

#### 5.1. Proceed if Suitable.
- **Action:** If local tools meet your criteria, prepare to shortlist them.
  - **How:** Highlight or mark these tools in your spreadsheet.
- **Objective:** To move to pilot testing.
  - **Why:** Local tools that pass the test are often easier to implement.
- **Method:** Use scorecards.
  - **How:** Review the scores to identify which local tools are suitable. If found, skip to Step 8.
### Step 6: Look Beyond Local

| 6.1. Expand Search | **Action:** If local tools don’t fit, look nationally or internationally.  
**How:** Use search engines and broaden your search terms to include national and international options.  
**Objective:** To have more options.  
**Why:** More options mean a better chance of finding the right tool.  
**Method:** Use the same methods as in Step 3.  
**How:** Keep adding to your spreadsheet as you find new tools. |
|-------------------|---------------------------------------------------|
| 6.2. Update Your List | **Action:** Add these new options to your list.  
**How:** Update your spreadsheet with the new findings.  
**Objective:** To prepare for another evaluation round.  
**Why:** You need to compare all options, local and non-local.  
**Method:** Use the same scoring system.  
**How:** Continue to score each tool based on your criteria. |

### Step 7: Evaluate Again

| 7.1. Assess Non-Local Tools | **Action:** Use the same criteria as before.  
**How:** Refer back to your scorecard and scoring system.  
**Objective:** To keep the evaluation process fair and consistent.  
**Why:** Consistency ensures a fair comparison.  
**Method:** Use your scorecard and scoring system again.  
**How:** Rate each non-local tool just like you did for the local ones. |
### Step 8: Shortlist

**8.1. Pick Top Contenders**
- **Action:** Identify the best 2-3 tools.
  - **How:** Look at the highest-scoring tools on your spreadsheet.
- **Objective:** To prepare for real-world testing.
  - **Why:** You can't know how well a tool works until you try it.
- **Method:** Reach a consensus within the team.
  - **How:** Have a team meeting to discuss and agree on the top picks.

### Step 9: Test in the Field

**9.1. Pilot Test**
- **Action:** Test the shortlisted tools in a small VSLA group.
  - **How:** Implement the tools in a controlled setting with a small group of users.
- **Objective:** To see how the tool performs in a real setting.
  - **Why:** Real-world testing reveals issues you won't see in a lab.
- **Method:** Use A/B testing or phased rollout.
  - **How:** Implement one tool at a time or use different tools in different small groups for comparison.

**9.2. Collect User Feedback**
- **Action:** Get opinions from VSLA members.
  - **How:** Distribute simple surveys or conduct brief interviews.
- **Objective:** To understand the tool's pros and cons.
  - **Why:** User feedback is invaluable for making the final decision.
- **Method:** Use both qualitative and quantitative methods.
  - **How:** Use open-ended questions for qualitative insights and multiple-choice questions for quantitative data.
## Step 10: Make the Final Choice

### 10.1. Review Data
- **Action:** Analyze all feedback and data.
  - **How:** Use simple data analytics tools to compile and visualize the data.
- **Objective:** To make an informed final choice.
  - **Why:** Data-driven decisions are more reliable.
- **Method:** Use data visualization tools.
  - **How:** Create charts or graphs to make the data easy to understand.

### 10.2. Decide
- **Action:** Have a final team meeting to make your choice.
  - **How:** Schedule a meeting and prepare a presentation of the findings.
- **Objective:** To pick the most suitable tool for full implementation.
  - **Why:** The final decision impacts the project's success.
- **Method:** Use a weighted decision matrix.
  - **How:** Assign weights to different criteria and calculate a final score for each tool.

## Step 11: Procure the Tool

### 11.1. Finalize Purchase
- **Action:** Complete the buying process.
  - **How:** Follow your organization's procurement guidelines.
- **Objective:** To officially acquire the tool.
  - **Why:** You need to own the tool to use it.
- **Method:** Follow organizational guidelines.
  - **How:** Make sure all paperwork is in order and all approvals are obtained.
12.1. Implement

- **Action:** Deploy the tool to all VSLA groups.
- **How:** Create an implementation plan that includes a timeline and training sessions.
- **Objective:** To start using the tool effectively.
- **Why:** The tool is only useful if people use it correctly.
- **Method:** Follow an implementation plan.
- **How:** Roll out the tool in phases, provide training, and offer support.
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Details</th>
<th>Completed</th>
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</thead>
<tbody>
<tr>
<td>Pre- Evaluation</td>
<td>Schedule Initial Meeting</td>
<td>Use a calendar tool to arrange a meeting with stakeholders.</td>
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<td></td>
<td></td>
<td>Develop a survey or list of questions for identifying user needs.</td>
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<td></td>
<td>Prepare Survey/Questions</td>
<td>Document necessary functionalities of the digital tool.</td>
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<td></td>
<td>List Essential Features</td>
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<td></td>
<td>Invite Evaluation Team</td>
<td>Send invitations to IT specialists, project leaders, etc.</td>
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<td></td>
<td>Create RAM</td>
<td>Use a spreadsheet to define roles and responsibilities.</td>
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<tr>
<td>Step 1</td>
<td>Identify Problems</td>
<td>Use Human-Centered Design techniques in the meeting.</td>
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<td></td>
<td>Prioritize Features</td>
<td>Apply the MoSCoW method for feature prioritization.</td>
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<tr>
<td>Step 2</td>
<td>Confirm Team Participation</td>
<td>Ensure diverse expertise on the evaluation team.</td>
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<td>Distribute RACI Chart</td>
<td>Clarify roles using a RACI chart.</td>
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<tr>
<td>Step 3</td>
<td>Research Local Tools</td>
<td>Search for local tools and compile findings.</td>
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<td></td>
<td>Compile Preliminary List</td>
<td>List tools with features, costs, etc.</td>
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<tr>
<td>Step 4</td>
<td>Cross-reference Features</td>
<td>Compare tools against the feature list.</td>
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<tr>
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<td>Evaluate Additional Criteria</td>
<td>Assess tools based on cost, scalability, etc.</td>
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<tr>
<td>Step 5</td>
<td>Review Local Tools</td>
<td>Highlight suitable local tools for shortlisting.</td>
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<td>Decide on Local Tools</td>
<td>Choose whether to proceed with or expand the search.</td>
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<tr>
<td>Step 6</td>
<td>Expand Search</td>
<td>Search for national/international options.</td>
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<td></td>
<td>Update List</td>
<td>Add new findings to the list.</td>
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<tr>
<td>Step 7</td>
<td>Evaluate Non-Local Tools</td>
<td>Assess non-local tools with the same criteria.</td>
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<tr>
<td>Step 8</td>
<td>Shortlist Top Tools</td>
<td>Identify the best 2-3 tools based on scoring.</td>
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<td>Reach Consensus</td>
<td>Have a team meeting to agree on top picks.</td>
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<td>Step 9</td>
<td>Pilot Test</td>
<td>Test shortlisted tools in a small group.</td>
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<td>Collect Feedback</td>
<td>Get user opinions via surveys/interviews.</td>
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<td>Step 10</td>
<td>Analyze Data</td>
<td>Use data visualization tools for analysis.</td>
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<td>Final Decision</td>
<td>Hold a meeting to make the final choice.</td>
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<tr>
<td>Step 11</td>
<td>Procure Tool</td>
<td>Complete the buying process following guidelines.</td>
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<td>Step 12</td>
<td>Implement Tool</td>
<td>Roll out the tool with a planned implementation strategy.</td>
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<tr>
<td>Post-Implementation</td>
<td>Gather User Feedback</td>
<td>Regularly collect feedback post-implementation.</td>
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<td>Post-Implementation</td>
<td>Monitor Impact</td>
<td>Evaluate the tool's impact on VSLA activities.</td>
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<td>Step 6</td>
<td>Stay Updated</td>
<td>Keep updated with technological advancements.</td>
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