

DETAILED GUIDE TO SELECTING DIGITAL TOOLS FOR VSLA PROGRAMS



Step 1: Understand Your Needs

1.1. Pinpoint Challenges

- **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.

1.2. List Required Features

- **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 to 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

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- **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.



| Step | Action | Details | Completed |
|-----------------|------------------------------|---|--------------------------|
| Pre- Evaluation | Schedule Initial Meeting | Use a calendar tool to arrange a meeting with stakeholders. | <input type="checkbox"/> |
| | Prepare Survey/Questions | Develop a survey or list of questions for identifying user needs. | <input type="checkbox"/> |
| | List Essential Features | Document necessary functionalities of the digital tool. | <input type="checkbox"/> |
| | Invite Evaluation Team | Send invitations to IT specialists, project leaders, etc. | <input type="checkbox"/> |
| | Create RAM | Use a spreadsheet to define roles and responsibilities. | <input type="checkbox"/> |
| Step 1 | Identify Problems | Use Human-Centered Design techniques in the meeting. | <input type="checkbox"/> |
| | Prioritize Features | Apply the MoSCoW method for feature prioritization. | <input type="checkbox"/> |
| Step 2 | Confirm Team Participation | Ensure diverse expertise on the evaluation team. | <input type="checkbox"/> |
| | Distribute RACI Chart | Clarify roles using a RACI chart. | <input type="checkbox"/> |
| Step 3 | Research Local Tools | Search for local tools and compile findings. | <input type="checkbox"/> |
| | Compile Preliminary List | List tools with features, costs, etc. | <input type="checkbox"/> |
| Step 4 | Cross-reference Features | Compare tools against the feature list. | <input type="checkbox"/> |
| | Evaluate Additional Criteria | Assess tools based on cost, scalability, etc. | <input type="checkbox"/> |

| Step | Action | Details | Completed |
|---------|--------------------------|---|--------------------------|
| Step 5 | Review Local Tools | Highlight suitable local tools for shortlisting. | <input type="checkbox"/> |
| | Decide on Local Tools | Choose whether to proceed with or expand the search. | <input type="checkbox"/> |
| Step 6 | Expand Search | Search for national/international options. | <input type="checkbox"/> |
| | Update List | Add new findings to the list. | <input type="checkbox"/> |
| Step 7 | Evaluate Non-Local Tools | Assess non-local tools with the same criteria. | <input type="checkbox"/> |
| Step 8 | Shortlist Top Tools | Identify the best 2-3 tools based on scoring. | <input type="checkbox"/> |
| | Reach Consensus | Have a team meeting to agree on top picks. | <input type="checkbox"/> |
| Step 9 | Pilot Test | Test shortlisted tools in a small group. | <input type="checkbox"/> |
| | Collect Feedback | Get user opinions via surveys/interviews. | <input type="checkbox"/> |
| Step 10 | Analyze Data | Use data visualization tools for analysis. | <input type="checkbox"/> |
| | Final Decision | Hold a meeting to make the final choice. | <input type="checkbox"/> |
| Step 11 | Procure Tool | Complete the buying process following guidelines. | <input type="checkbox"/> |
| Step 12 | Implement Tool | Roll out the tool with a planned implementation strategy. | <input type="checkbox"/> |

| Step | Action | Details | Completed |
|---------------------|----------------------|---|--------------------------|
| Post-Implementation | Gather User Feedback | Regularly collect feedback post-implementation. | <input type="checkbox"/> |
| | Monitor Impact | Evaluate the tool's impact on VSLA activities. | <input type="checkbox"/> |
| Step 6 | Stay Updated | Keep updated with technological advancements. | <input type="checkbox"/> |

