SMS and IVR Data Collection Mechanisms in M&E Training Course

Professional Development Training Course Outline

Category	Monitoring and Evaluation	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

SMS and IVR Data Collection Mechanisms in M&E Training Course equips professionals with the skills to leverage mobile-based data collection technologies for accurate, real-time, and cost-effective monitoring. In today's rapidly evolving digital landscape, organizations require innovative tools to collect, validate, and analyze data efficiently. This course emphasizes the use of SMS (Short Message Service) and IVR (Interactive Voice Response) systems to enhance data quality, improve response rates, and streamline reporting in diverse M&E contexts. Participants will explore digital data collection strategies, mobile surveys, automated reporting, and data analytics tailored for social, health, environmental, and development projects.

This course is designed for professionals seeking to enhance data-driven decision-making, strengthen accountability frameworks, and harness emerging mobile technologies for effective project evaluation. Through practical exercises, real-life case studies, and interactive simulations, participants will learn to design SMS and IVR questionnaires, manage respondent databases, integrate mobile data with analytics dashboards, and overcome challenges such as response bias, connectivity constraints, and data privacy issues. By the end of the program, learners will gain hands-on expertise in mobile M&E systems, preparing them to implement efficient, scalable, and ethical data collection processes across sectors.

Programme Curriculum

SMS and IVR Data Collection Mechanisms in M&E Training Course

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10 days

Course Objectives

1. Master SMS and IVR data collection techniques for real-time M&E.
2. Develop mobile survey design skills for high response accuracy.
3. Understand digital respondent engagement strategies to maximize participation.
4. Learn automated reporting and analytics integration.
5. Apply data validation and cleaning methods for reliable datasets.
6. Explore mobile technology adoption trends in M&E.
7. Enhance project monitoring efficiency through automated tools.
8. Manage multi-channel data collection platforms effectively.
9. Implement ethical and privacy-compliant mobile data practices.
10. Optimize cost-effective data collection strategies using SMS and IVR.
11. Analyze real-time feedback loops for adaptive program management.
12. Strengthen decision-making with predictive analytics from mobile data.
13. Evaluate impact of SMS and IVR tools in diverse M&E contexts.

Target Audience

1. M&E Officers and Specialists
2. Project Managers in development programs
3. Data Analysts and Statisticians
4. ICT and Digital Solutions Managers
5. Research Consultants
6. Public Health and Social Program Evaluators
7. Nonprofit and NGO Program Coordinators
8. Government Monitoring & Evaluation Units

Course Modules

Module 1: Introduction to Mobile Data Collection in M&E

- Overview of SMS and IVR systems in evaluation
- Benefits of mobile data collection vs traditional methods

- Understanding mobile survey workflows
- Key success factors for digital data collection
- **Case Study:** SMS-based health monitoring in rural Kenya

Module 2: SMS Survey Design Principles

- Crafting concise, actionable survey questions
- Response scale and coding techniques
- Message scheduling for higher engagement
- Error-proofing SMS content
- **Case Study:** Agricultural extension services survey via SMS

Module 3: IVR System Fundamentals

- IVR architecture and call flow design
- Voice message scripting and recording
- Multi-language and accessibility considerations
- Automating data capture from calls
- **Case Study:** IVR monitoring for maternal health programs

Module 4: Mobile Data Management Platforms

- Overview of SMS and IVR software tools
- Database integration techniques
- Real-time dashboards and analytics
- Exporting and syncing mobile data
- **Case Study:** Integration of IVR feedback into M&E dashboards

Module 5: Respondent Engagement Strategies

- Building trust and rapport via mobile channels
- Incentivization and reminders
- Reducing survey fatigue
- Handling opt-outs and complaints
- **Case Study:** Community feedback for water projects using SMS

Module 6: Data Quality Assurance

- Validation rules for SMS/IVR inputs
- Detecting and handling duplicate responses
- Techniques to minimize non-response bias
- Ensuring data completeness and reliability
- **Case Study:** IVR survey error management in urban monitoring

Module 7: Ethical and Privacy Considerations

- Data protection regulations
- Confidentiality and informed consent
- Secure storage and transmission
- Anonymization and de-identification techniques
- **Case Study:** Compliance with Kenya Data Protection Act in mobile M&E

Module 8: Cost and Resource Optimization

- Budgeting for mobile surveys
- Choosing cost-effective communication channels
- Resource allocation and ROI measurement
- Leveraging open-source tools
- **Case Study:** Cost reduction in NGO mobile surveys

Module 9: Integrating Mobile Data with M&E Systems

- Linking SMS/IVR data to existing M&E frameworks
- API integration for automated reporting
- Data visualization and interpretation
- Adaptive program management
- **Case Study:** Integration of SMS feedback into health dashboard

Module 10: Real-Time Analytics and Reporting

- Live data tracking and alerts
- Predictive analytics for decision-making
- Key performance indicators from mobile data
- Automated reporting workflows
- **Case Study:** Real-time monitoring of school attendance via SMS

Module 11: Multi-Channel Approaches

- Combining SMS, IVR, and online surveys
- Pros and cons of hybrid data collection
- Respondent segmentation for targeting
- Cross-platform data harmonization
- **Case Study:** Disaster response monitoring using SMS and IVR

Module 12: Troubleshooting and Support

- Handling connectivity and technical issues
- Maintaining system uptime and reliability
- User support and troubleshooting scripts
- Escalation protocols
- **Case Study:** IVR system uptime management in rural areas

Module 13: Case Studies in SMS and IVR M&E

- Comparative analysis of global mobile M&E initiatives
- Lessons learned from low-resource settings
- Replication strategies
- Key takeaways and best practices
- **Case Study:** SMS vaccination reminders in sub-Saharan Africa

Module 14: Future Trends in Mobile Data Collection

- AI-powered IVR and chatbots
- Mobile data for predictive M&E

- Integration with IoT and remote sensing
- Emerging digital trends in development evaluation
- **Case Study:** AI-assisted SMS surveys for urban planning

Module 15: Capstone Project and Practical Simulation

- Designing end-to-end SMS/IVR M&E project
- Implementing survey, collecting, and analyzing data
- Presenting findings in dashboards and reports
- Peer feedback and real-world problem solving
- **Case Study:** Participant-led mobile survey simulation

Training Methodology

This course employs a participatory and hands-on approach to ensure practical learning, including:

- Interactive lectures and presentations.
- Group discussions and brainstorming sessions.
- Hands-on exercises using real-world datasets.
- Role-playing and scenario-based simulations.
- Analysis of case studies to bridge theory and practice.
- Peer-to-peer learning and networking.
- Expert-led Q&A sessions.
- Continuous feedback and personalized guidance.

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	04 Dec 2026	Online	$2,000
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

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