Chatbot-Assisted Surveys for 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

Chatbot-Assisted Surveys are transforming Monitoring and Evaluation (M&E) by enabling real-time, scalable, and cost-efficient data collection through conversational interfaces such as WhatsApp, SMS, Telegram, USSD, and web chatbots. Leveraging AI, Natural Language Processing (NLP), and automation, chatbots increase response rates, reduce enumerator bias, and improve data accuracy especially in hard-to-reach, low-literacy, and remote populations. Chatbot-Assisted Surveys for M&E Training Course equips participants with practical skills to design, deploy, and manage chatbot-driven surveys aligned with results-based management, adaptive programming, and evidence-driven decision-making.

Participants will gain hands-on experience in survey logic automation, multilingual chatbot design, ethical AI use, data security, and integration with M&E platforms such as DHIS2, Power BI, KoboToolbox, and cloud databases. Through real-world case studies, learners will explore how chatbot-assisted surveys support baseline studies, routine monitoring, feedback mechanisms, outcome harvesting, and rapid evaluations in development, humanitarian, health, governance, and private-sector programs.

Programme Curriculum

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Course Objectives

By the end of the course, participants will be able to:

1. Design chatbot-based M&E surveys using conversational UX principles
2. Apply AI and NLP to improve data quality and respondent engagement
3. Automate logic flows, skip patterns, and validations
4. Deploy chatbots across SMS, WhatsApp, USSD, and web platforms
5. Integrate chatbot data with M&E dashboards and MIS systems
6. Improve response rates and inclusivity in data collection
7. Ensure data privacy, ethics, and informed consent
8. Conduct real-time monitoring and adaptive management
9. Reduce data collection costs and operational risks
10. Implement feedback and accountability mechanisms (FAMs)
11. Use chatbot data for outcome and impact analysis
12. Troubleshoot bias, drop-offs, and system failures
13. Scale chatbot surveys for national and multi-country programs

Target Audience

1. Monitoring & Evaluation Officers
2. Program and Project Managers
3. NGO and Donor-Funded Project Staff
4. Government M&E and Planning Units
5. Digital Transformation Specialists
6. Research and Data Analysts
7. Humanitarian Response Coordinators
8. Development Consultants and Evaluators

Course Modules

Module 1: Introduction to Chatbot-Assisted M&E

- Evolution of digital data collection
- Chatbots vs traditional surveys
- Use cases in M&E
- Benefits and limitations
- **Case Study:** NGO switching from paper surveys to WhatsApp bots

Module 2: Foundations of Conversational Survey Design

- Conversational UX principles
- Question phrasing for chatbots
- Avoiding survey fatigue
- Tone and cultural sensitivity
- **Case Study:** Improving completion rates through conversational design

Module 3: AI & NLP in Survey Automation

- NLP basics for M&E
- Intent recognition and entity extraction
- Structured vs unstructured responses
- AI-assisted probing
- **Case Study:** AI-driven qualitative feedback analysis

Module 4: Survey Logic & Automation

- Skip logic and branching
- Conditional workflows
- Error handling and validations
- Time-based triggers
- **Case Study:** Automating baseline and follow-up surveys

Module 5: Multilingual & Inclusive Survey Design

- Language localization strategies
- Low-literacy adaptations
- Voice and IVR integrations
- Accessibility considerations
- **Case Study:** Rural community data collection

Module 6: Platforms & Tools for Chatbot Surveys

- WhatsApp, SMS, USSD, Telegram
- No-code vs low-code platforms
- Chatbot builders overview
- Platform selection criteria
- **Case Study:** Selecting tools under budget constraints

Module 7: Data Quality Assurance

- Minimizing bias and errors
- Real-time data validation
- Monitoring response patterns
- Handling incomplete surveys
- **Case Study:** Data quality improvement using automated checks

Module 8: Ethics, Consent & Data Protection

- Informed consent via chatbots
- GDPR and data protection principles
- AI ethics in M&E
- Secure data storage

- **Case Study:** Ethical risks in automated feedback systems

Module 9: Integration with M&E Systems

- Linking chatbots to DHIS2
- API integrations
- Cloud databases and spreadsheets
- Data pipelines for dashboards
- **Case Study:** Real-time M&E dashboard integration

Module 10: Real-Time Monitoring & Adaptive Management

- Live data streams
- Early warning indicators
- Adaptive decision-making
- Rapid course correction
- **Case Study:** Crisis response monitoring

Module 11: Feedback & Accountability Mechanisms

- Two-way communication models
- Complaint and feedback loops
- Closing the feedback loop
- Community trust building
- **Case Study:** Accountability chatbots in humanitarian aid

Module 12: Chatbots for Baseline, Midline & Endline Studies

- Longitudinal survey design
- Panel management
- Attrition mitigation
- Data consistency strategies
- **Case Study:** Multi-round program evaluation

Module 13: Analyzing & Visualizing Chatbot Data

- Quantitative and qualitative analysis
- Text analytics for open responses
- Visualization best practices
- Insight storytelling
- **Case Study:** Turning chatbot data into donor reports

Module 14: Scaling & Sustainability

- Scaling nationally and regionally
- Cost-benefit analysis
- Capacity building
- System maintenance
- **Case Study:** National M&E chatbot rollout

Module 15: Future Trends in Chatbot-Driven M&E

- Generative AI in evaluations

- Voice bots and multimodal surveys
- Predictive analytics
- Ethical AI futures
- **Case Study:** AI-powered adaptive evaluations

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

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com