

## APPENDIX 2

### **SURVEY QUESTIONNAIRE HEAD OF A BUSINESS UNIT**

Name of the Bank: \_\_\_\_\_

Branch location and Address:

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Name and title of the person completing this questionnaire:

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1. Which category does your Bank belong?

- ☐ Multinational
- ☐ Private Sector
- ☐ Public Sector
- ☐ Local
- ☐ Other, specify \_\_\_\_\_

2. Is this location:

- ☐ a zonal office
- ☐ a branch or local office
- ☐ the headquarters for a multisite operation

3. How many employees, both full and part time, are employed at this location?

- ☐ 1 to 24
- ☐ 25 to 50
- ☐ 50 to 99
- ☐ 100 to 499
- ☐ 500 or more

4. All the branches for this bank are:

- ☐ located in this city
- ☐ located in Gujarat

- ☐ located in India
- ☐ located around the world

5. In which year did this location open?

- ☐ Before 1970
- ☐ 1970 – 1979
- ☐ 1980 – 1989
- ☐ 1990 – 1999
- ☐ 2000 – 2005

6. What % of the following technology based facilities are used at your branch location to collect information from the customers:

- |  | %     |
|--|-------|
| <input type="checkbox"/> E-mail for business transactions                    | _____ |
| <input type="checkbox"/> E-mail for customer service ( including complaints) | _____ |
| <input type="checkbox"/> Customer service by phone (including complaints)    | _____ |
| <input type="checkbox"/> Credit card and debit card payments                 | _____ |
| <input type="checkbox"/> ATM services  | _____ |
| <input type="checkbox"/> Internet services                                   | _____ |
| <input type="checkbox"/> Others, please specify _____                        | _____ |

Which have been most effective? Why? (provide data %) \_\_\_\_\_

Which have been useless? Why? (provide data %) \_\_\_\_\_

7. What % of the following facilities are provided at your branch location for the employees working on CRM applications:

- |   | %     |
|---|-------|
| <input type="checkbox"/> Telecommuting                                      | _____ |
| <input type="checkbox"/> Compensation for late work hours                   | _____ |
| <input type="checkbox"/> Inhouse training on latest CRM technology acquired | _____ |
| <input type="checkbox"/> Others, specify _____                              | _____ |

8. In which year did this location start using Internet for Business purposes?

- ☐ 1990 – 1999
- ☐ 2000
- ☐ 2001

☐ 2002 and later

9. In 2005, what percentage of this location's overall budget was dedicated to CRM based Information Technology (acquiring new technology)?

- ☐ None
- ☐ 1% to 10%
- ☐ 11% to 20%
- ☐ 21% to 50%
- ☐ 50% or more

10. In 2005, what percentage of this location's overall budget was dedicated to CRM based Information Technology (maintaining current technology)?

- ☐ None
- ☐ 1% to 10%
- ☐ 11% to 20%
- ☐ 21% to 50%
- ☐ 50% or more

11. You perceive what percentage increase in the overall budget allotment to CRM based Information Technology (acquiring new technology) in the next 5 years?

- ☐ None
- ☐ 1% to 10%
- ☐ 11% to 20%
- ☐ 21% to 50%
- ☐ 50% or more

12. You perceive what percentage increase in the overall budget allotment to CRM based Information Technology (maintaining current technology) in the next 5 years?

- ☐ None
- ☐ 1% to 10%
- ☐ 11% to 20%
- ☐ 21% to 50%

☐ 50% or more

13. What is the percentage of increase in loyal customers (customer total share in making specified number of repeated use of a particular service over a finite period of time) in year 2005? Please provide reasons.

- ☐ None
- ☐ 1% to 10%
- ☐ 11% to 20%
- ☐ 21% to 50%
- ☐ 50% or more

14. What is the percentage of loss in loyal customers (customer total share in making specified number of repeated use of a particular service over a finite period of time) in year 2005? Please provide reasons.

- ☐ None
- ☐ 1% to 10%
- ☐ 11% to 20%
- ☐ 21% to 50%
- ☐ 50% or more

15. What was the reason for losing loyal customers (customer total share in making specified number of repeated use of a particular service over a finite period of time) in year 2005?

- ☐ Technology based services were not adequate
- ☐ Customer service was slow
- ☐ Bank employees were not trained enough to handle changes in technology
- ☐ Inconvenient Bank timings
- ☐ Others, please specify

16. What is the expected percentage of increase in loyal customers (customer total share in making specified number of repeated use of a particular service over a finite period of time) in the next 5 years, considering the enhanced technology based CRM facilities you plan to provide?

- ☐ None
- ☐ 1% to 10%
- ☐ 11% to 20%
- ☐ 21% to 50%
- ☐ 50% or more

\*\*\*\*\*I THANK YOU FOR YOUR TIME\*\*\*\*\*