

APPENDIX 2

SURVEY QUESTIONNAIRE

HEAD OF A BUSINESS UNIT

Name of the Bank: _____

Branch location and Address:

Name and title of the person completing this questionnaire:

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*****