

APPENDIX 3

**SURVEY QUESTIONNAIRE
CRM INITIATIVES MANAGER**

Name of the Bank: _____

Branch location and Address:

Name and title of the person completing this questionnaire:

1. What is your position with the company?

- ☐ Executive, Director or other senior manager
- ☐ Senior Manager
- ☐ Manager
- ☐ Staff member
- ☐ Others, please specify

2. How many people are employed by your organization? (all locations)

- ☐ Less than 100
- ☐ 100 – 999
- ☐ 1,000 – 9,999
- ☐ 10,000 or more

3. What % of them are working on CRM applications? (all locations)

- ☐ Less than 10%
- ☐ 11% to 20%
- ☐ 21% to 50%
- ☐ 50% or more

4. Which corporate function has enterprise wide responsibility for CRM in your organization?

- ☐ Finance
- ☐ Human Resource
- ☐ Information Technology

- ☐ Marketing
- ☐ Sales
- ☐ Other corporate function (Please name) _____

5. What % of each of the stated is driving CRM within your company?

- | | % |
|--|-------|
| <input type="checkbox"/> Through examples of competitors | _____ |
| <input type="checkbox"/> Using skills and tools | _____ |
| <input type="checkbox"/> Others, please specify | _____ |

6. How would you characterize the level of senior management commitment to sponsor and fund enterprise-wide CRM in your company?

- ☐ Enterprise CRM is already an established priority
- ☐ Management has agreed to make CRM an established priority in the next 2 years
- ☐ Management agrees CRM is important, but there are more pressing priorities
- ☐ Management does not recognize the importance of CRM

7. How clearly have executives in your organization communicated a CRM Program vision?

- ☐ Completely
- ☐ Mostly
- ☐ Somewhat
- ☐ Partially
- ☐ Not at all

8. How important will E-commerce be to your business within the next 2 years?

- ☐ Mission critical
- ☐ Significant
- ☐ Important
- ☐ Somewhat
- ☐ Not at all

9. When will E-commerce considerations be included in your CRM program?

- ☐ Already included since _____
- ☐ In process of implementing now
- ☐ Scheduled in near future but not yet started
- ☐ Recognized as important but no commitment to start
- ☐ Not on your radar screen yet

Interview questions

1. What are the strategic reasons for implementing CRM?
2. What are the different types of CRM applications in your bank?
3. What are the various categories of data handled by CRM applications and in what %? Please provide details.
4. What specific methods are instituted to track customer satisfaction and what is each of its % contribution?
5. How does the organization calibrate its processes to drive customer satisfaction. What is the role of automation and technology in this calibration. Please categorize and provide details.
6. What is the impact of the customer information in enhancing Marketing effectiveness?
7. What are the drivers (methods) of customer retention?

8. What impediments do you face within the organization for integrating technology in CRM activities?
9. What are the methods of measuring the level of success in collecting reliable customer information?
10. What methods are utilized to use the above information in driving new customer acquisition?
11. What is the attitude of Marketing functionaries towards technology integration (%) in CRM activities?
12. Is technology important for effective CRM? Why/ why not? What does it facilitate/ does not facilitate? Why/ why not?

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