ANNEXURES

Annexure-1
Questionnaire for Customers of the Organisation

Name of the Customer: ……………………………………………………………………

Age: ……… Sex: M/ F Qualifications: ………Occupation:……………………

Contact details: Phone:…………………………… e-mail ID: ……………………..

1. How long have you been associated with the organisation?
…………………………………………………………………………………………

2. Frequency of your visit to the organisation?
   a) Daily             b) 2 to 3 times a week
   c) Once a week       d) Once or twice a month
   e) As and when the need arises

   For Hotel customers:
   a) Once a week       b) Once in a fortnight    c) Once in a month
   d) Twice or thrice in a year e) As and when the need arises

3. How often did you have to make complaints about the products & service offered by the organisation?
   a) Several times    b) Once or twice     c) Do not remember   d) Never

4. Whether at any time you did not get service at all or were delayed or did not get proper attention at all?
   a) Several times    b) Once or twice     c) Do not remember   d) Never

5. Frequency of customer meets organized by the bank?
   a) Once in a year   b) Twice a year     c) On special occasions
   d) Never

Contd...2
Please indicate the extent to which you agree or disagree with the following statements:
(Tick (√) the appropriate box 1=Strongly Disagree  2=Disagree 
3= Neither Agree nor Disagree  4=Agree and  5=Strongly Agree)

<table>
<thead>
<tr>
<th>S No.</th>
<th>Statement</th>
<th>1</th>
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<tbody>
<tr>
<td>1</td>
<td>The bank responds promptly to my complaints and takes corrective measures.</td>
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<td>2</td>
<td>Online transactions on the internet (through the bank’s website) is available.</td>
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<td>3</td>
<td>Online transactions on the internet (through company’s website) is convenient to me and leads to satisfaction.</td>
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<td>4</td>
<td>The staff of the bank is always courteous polite and cooperative to me.</td>
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<td>5</td>
<td>The service and the staff of the company give me a ‘sense-of-belonging’ to the bank.</td>
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<td>6</td>
<td>I receive greetings on special occasions from the bank.</td>
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<td>7</td>
<td>I always receive information about special offers and discounts.</td>
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<td>8</td>
<td>I fully trust the bank and its staff.</td>
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<td>9</td>
<td>The bank has implemented e-CRM for the benefit of its customers.</td>
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<td>10</td>
<td>e-CRM programme of the company has really helped me and has improved my relationship with the bank.</td>
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<td>11</td>
<td>Since the implementation of the e-CRM programme, I have found a change in the behaviour of the staff. They have become more cooperative and polite.</td>
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<td>12</td>
<td>There has never been a delay in the service rendered by the bank.</td>
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<td>13</td>
<td>The bank welcomes suggestions from me and takes action on them.</td>
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<td>14</td>
<td>I am always invited to customer meets organized by the bank.</td>
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</table>

6. Your suggestions to improve customer satisfaction…………………………

                                                                                     ……………………………………………………………………………………………

(Name)        (Signature)
Annexure-2
Questionnaire for high-ranking Marketing/Sales/
Customer Relationship Managers and Officers of the Organisation

1. Name of the Organisation:  ………………………………………………………

2. Name of the Respondent: …………………………………………………….

3. Respondent’s Designation: ……………………………………………………

4. What are the top three objectives of your CRM programme?
   a)………………………………………………………………………………
   b)………………………………………………………………………………
   c)………………………………………………………………………………

5. How would you describe the CRM organization structure?
   ………………………………………………………………………………………
   ………………………………………………………………………………………
   ………………………………………………………………………………………

6. What type of CRM technologies have you implemented for interacting with your customers?
   a) Call Centre     b) Campaign Management  c) Contact Management
   d) Personalization e) Marketing Automation  f) Data Warehousing
   g) Sales Force Automation  e) Any other please specify
   …………………………………………………………………………………

7. What are the benefits achieved from implementing the CRM system?
   a)…………………………………………………………………………
   b)………………………………………………………………………………
   c)………………………………………………………………………………
   d)………………………………………………………………………………
   e)………………………………………………………………………………

8. Is the CRM application package Off-the-shelf or Custom built?
   ☐ Off-the-shelf   ☐ Custom-built

   Who is your vendor?………………………………………………
9. Approximate investment made in the CRM application?
   □ Below Rs.50 lacs  □ Rs.50 lacs to 1Crore  □ Rs.1 to 2 Crores
   □ Rs.2 to 3 Crores  □ 3 to 4 Crores  □ Above Rs. 4 Crores

10. How do you justify the investment in the CRM programme.
    a)........................................................................................................
    b)........................................................................................................
    c)........................................................................................................
    d)........................................................................................................

11. What is the time period between the investment in the CRM programme and the perceived benefits.
    □ Less than 6 months  □ 1year  □ 1 to 2 Years  □ 2 to 3 years  □ more
    □ than 3 years

12. What information do you need in your database so that you can develop your CRM strategy?
    ........................................................................................................
    ........................................................................................................
    ........................................................................................................

13. What are the difficulties/constraints of maintaining the customer database?
    ........................................................................................................
    ........................................................................................................
    ........................................................................................................

14. What is the rate of growth of data (speed at which the data gets generated every month?)
    ........................................................................................................

15. What are the different ways of obtaining customer information? …
    a)........................................................................................................
    b)........................................................................................................
    c)........................................................................................................
    d)........................................................................................................

16. Which department or unit is responsible for the analysis and distribution of data?
17. Is senior management actively involved in the CRM program?
   □ Yes □ No

18. Is the staff that comes in direct contact with the customers encouraged to give suggestions to improve the quality of service offered?
   □ Yes □ No

19. Do senior managers accept and discuss ideas offered from staff about improving the system?
   □ Yes □ No

20. How do you evaluate the success of the CRM programme (mention your evaluation metrics)
   a) ...........................................................................................................
   b) ...........................................................................................................
   c) ...........................................................................................................
   d) ...........................................................................................................

21. How do you get to know your customers expectations about your product or service?
   a) ...........................................................................................................
   b) ...........................................................................................................

22. How do you know if your customers are satisfied?
   ..............................................................................................................

23. What do you do with customer complaints?
   ..............................................................................................................

24. Does your CRM strategy involve identifying ‘loyal customers’?
   □ Yes □ No

25. If yes how do you reward them?
   ..............................................................................................................

26. Are your loyal customers also profitable customers?
   □ Yes □ No

27. Do you categorize your customers as more valuable or less valuable?
   □ Yes □ No
28. If yes what is the criteria of identifying high value customers?

29. What is the relation between customer loyalty and profitability?
   a)...........................................................................................
   b)...........................................................................................
   c)...........................................................................................

30. Is your organization and its processes customer oriented?
    ☐ Yes    ☐ No

31. What do you do to acquire new customers?
   a)...........................................................................................
   b)...........................................................................................
   c)...........................................................................................

32. What do you do to retain existing customers?
   a)...........................................................................................
   b)...........................................................................................
   c)............................................................................................
Please indicate the extent to which you agree or disagree with the following statements: (Tick (✓) the appropriate box where 1=Strongly Disagree  2 =Disagree 3=Neither Agree nor Disagree  4=Agree and 5=Strongly Agree)

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<tbody>
<tr>
<td>1</td>
<td>We organize customer meets regularly to identify the products or services that the customers need.</td>
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<td>2</td>
<td>We conduct market surveys periodically to find out the changing trends, consumer behaviour and motivational factors.</td>
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<td>3</td>
<td>Our marketing programmes differ as per the needs of our customer.</td>
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<td>4</td>
<td>In our industry customer preferences keep changing very often.</td>
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<td>5</td>
<td>Selection and implementation of technology is strictly based on customer needs and benefits the customer.</td>
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<td>6</td>
<td>In our organization products and services are tailored according to our customer’s needs</td>
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<td>7</td>
<td>Generally it is difficult to anticipate or predict customer behaviour.</td>
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<td>8</td>
<td>We are able to differentiate our different customers on the basis of their loyalty (number of years with us/age on network/vintage customer).</td>
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<td>9</td>
<td>Each functional department in the business unit interacts with the other to discuss customer needs and wants.</td>
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<td>10</td>
<td>We have an effective complaint management system.</td>
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<td>11</td>
<td>We have implemented a very sound system for collection of customer information.</td>
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<td>12</td>
<td>We share the CRM ideas and resources with other functional departments.</td>
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<td>13</td>
<td>We have a formal communication system of informing the entire organization about important information regarding the customers.</td>
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<td>14</td>
<td>All the employees of the relevant department have up-to-date information about changing needs/wants of the customer.</td>
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<td>15</td>
<td>We have a formal communication method between the marketing/sales and the product/service development departments due to which we are able to satisfy customer needs effectively.</td>
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<td>16</td>
<td>We train our staff/sales persons/franchisees in such a manner that they provide the customers with a convenient and delightful solution.</td>
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<td>17</td>
<td>Our staff/sales persons/franchisees are empowered to deliver superior service to the customer.</td>
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<td>18</td>
<td>We evaluate the performance of our staff/sales persons/franchisees.</td>
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<td>19</td>
<td>We train and encourage our sales staff to keep track of the customer’s likes and dislikes so as to provide them with better service next time.</td>
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<td>20</td>
<td>We have a grievance management system for our franchisees/advisors/sales staff/retailers.</td>
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<td>21</td>
<td>We have devised a mechanism to gauge the needs and service patterns of our franchisees/advisors/sales staff/retailers.</td>
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<td>22</td>
<td>We have informal meets/get-together in our organization, which make us feel part of a large family.</td>
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<td>23</td>
<td>We have an informal environment in our organization relating to dress code, seating arrangements etc.</td>
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<td>24</td>
<td>We conduct a formal SWOT analysis for our company at regular intervals in order to plan better strategies</td>
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<td>25</td>
<td>Business functions within the organization are integrated to serve the needs of CRM.</td>
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