

## SESSION 3:

### 1. DESIGN A SURVEY INSTRUMENT

1. The steps to frame a questionnaire are many:
  - i. Have clarity about the information which has to be uncovered through the questionnaire
  - ii. Arrive at the best kind of questions, close ended or open ended, which can bring out the information.
  - iii. Frame objective questions which are simple to understand and conveys the idea clearly , without use of short forms or abbreviations
  - iv. Decide whether using a rating system or not is the best way ahead to achieve the objectives of the questionnaire
  - v. Follow a logical order while presenting the questions
  - vi. Ensure that the target group will be able to allot the time necessary to answer the questions
  - vii. Get feedback on the questionnaire from the experts and make necessary corrections
  - viii. Present before the main stakeholders and get their feedback
2. The purpose of the survey I am designing is to evaluate and analyze the satisfaction levels of the customers of a major bank with branches all over the nation such that pointers for the improvements to be made to the infrastructure, the services and approach of the bank may be understood to increase the appeal of the bank to its customers and thus maximize its potential.
3. The survey will be completed by an established analytical firm which will be entrusted with the duty of carrying out the survey on the behalf of the bank. The analytical firm will use its employees as well as its wide network of contacts to ensure maximum reach of the survey, even to the grassroots levels of the population.
4. To carry out the survey the questionnaire will be distributed to the branch offices through emails and well as by sending surveyors of the analytical firm with tablets which have the software which uploads the entire questionnaire to it. The software will enable the surveyor to send the data entered back to the head office for analysis immediately.
5. The surveyor will have the primary responsibility to observe the bank and the infrastructural facilities provided by the bank. Some of the questions for this can be:
  - i. How would you rate this branch of the bank in terms of accessibility?
  - ii. Does the branch have uninterrupted power supply?
  - iii. Does the branch provide washroom facilities to its customers?

- iv. Does the branch have an ATM Machine near its branch?
- v. Does the branch hold monthly meetings to get feedback from the customers?
- vi. How strictly are the banking rules and regulations adhered to by the branch?
- vii. Are there special notice boards which carry an account of the special schemes implemented by the branch?

After the surveyor enters these details through the response of the bank manager and his own observation, he can ask some questions to the customers, as follows:

- i. how long have you been a customer of this branch?
- ii. How many special schemes of the bank do you avail yourself of, at the moment?
- iii. How would you rate the behavior of the bank employees towards the customer?
- iv. How do you find the ambience of the branch?
- v. Which scheme have you found to be the most beneficial for you?
- vi. What are your primary expectations from the banking sector?
- vii. How would you rate the satisfaction provided by the services of this bank?

6. I will refine the questions by presenting them before experts who have vast experience in framing questionnaires to ensure that the framing of the questions have been done in an objective manner such that it does not hint at biases and that it maintains a neutral tone.

I will validate the questionnaire by presenting it before the concerned officials of the primary stakeholder, which is the bank to get their feedback. They will be asked to confirm whether or not the answers for the questions put forth through the questionnaire will help them derive the desired results out of the survey.

- 7. I will use the numerical rating criteria to code most of the close ended questions. This will be followed by the use of ranges to record the feedback to the open ended questions.
- 8. The demographic data needed to code the answers would be the location of the branch, the title of the highest branch official for the branch, the number of years the branch has been operational in the area, the number of renovations and reformations it has undergone, the number of clients at each branch, the age group to which majority of the clients of the branch belongs to etc.

## 2. PLAN TO COLLECT DATA

The duty will be divided among the zonal heads of the analytical firm who will act as the intermediary between the head office and the surveyors. The tablets which are distributed among the surveyors will contain the location and branch names of the bank branches they have to cover. After going to the bank branch the surveyor will enter his observations into the tablet followed by the part where questionnaire will be answered by the bank manager and the customers. Once this is done, the information is uploaded immediately using the internet which

will take the data to the head office. The zonal head will keep track of the work done and ensure that systematic coverage of the geographical zone is done.

### 3. HOW TO ANALYZE THE DATA AND WHAT TRENDS TO ANALYZE

To analyze the data different software's can be used like SPSS and SAS which will guide the statistician or the analyst of the analytical firm.

The survey aims to analyses the following:

- i. Infrastructural changes that are to be made to the existing branches to make them customer friendly
- ii. Improve the retention rate of the customers after identifying loopholes
- iii. Analyze the accessibility of the branch
- iv. Satisfaction levels with the existing schemes of the bank
- v. Analyze the implementation level of the rules and regulations regarding banking by the branches.

### 4. CASE STUDY ON DANA PRITCHARD

1. Dana should learn managerial skills where she should act as the conduit between the employees and the bosses by keeping the employees informed about things which are relevant to their role in the company.

Dana should try to implement productive processes like interactive production processes to make all the employees equally aware of the process rather than individually handling them in a rude manner which can be counterproductive.

When there is a conflict Dana should take up the role of the mediator with the intention of finding solutions to the issue in a fair and transparent manner rather than getting irritated and acting out in a negative fashion.

2. Developmental plan activities which can be implemented are:

- Enroll in personality development programs
- Go for managerial course to gain the education which will give her the skills to handle the situations she will encounter
- Joining anger management classes
- Joining a program to learn soft skills
- Increased interaction with fellow managers who have experience in the field