

**Specification of Competency Standards**  
**for the Banking Industry**  
**Unit of Competency**

Functional Area - 8. Quality Management  
(Key Function – 8.2 Quality Monitoring and Control)

Title	Design survey to measure customer satisfaction
Code	109464L5
Range	Designing of survey for measuring customer's perception on the bank's products and services. This applies to survey for different segments of customers and measuring different aspects of the bank's products and services.
Level	5
Credit	4 (For Reference Only)
Competency	<p>Performance Requirements</p> <p>1. Knowledge in the Subject Area</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Possess expertise knowledge in conducting survey and apply it to evaluate the objectives and operational procedures of services to be provided in order to develop suitable survey;</li> <li>• Possess in-depth knowledge in customer experience management to develop the objectives and scope of the survey according to the business needs of the bank.</li> </ul> <p>2. Applications</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Select suitable survey methods (e.g. questionnaires, focus group), data collection channels (e.g. face-to-face, phone, internet) and frequency according to the survey objectives;</li> <li>• Identify variables to be measured in the survey to ensure all useful information is covered;</li> <li>• Design questions for the survey in order to obtain useful information for assessing customer satisfaction and planning for future initiatives;</li> <li>• Develop tools (e.g. checklists, script) to facilitate data collection process to ensure the survey is effectively conducted;</li> <li>• Develop the detailed operational plan for the customer satisfaction survey (e.g. launch period, target groups, distribution methods) to ensure a smooth operation.</li> </ul> <p>3. Professional Behaviour and Attitude</p> <p>Be able to:</p> <ul style="list-style-type: none"> <li>• Oversee the data collection process in order to ensure data accuracy and integrity.</li> </ul>
Assessment Criteria	<p>The integral outcome requirements of this UoC are:</p> <ul style="list-style-type: none"> <li>• Development of framework and operational plan of customer satisfaction survey to consolidate useful information for improving services of the bank. The design of the survey should be based on analysis on the business needs of the bank and operation / services under evaluation.</li> </ul>
Remark	