

Specification of Competency Standards of the Insurance Industry

**Unit of Competency**

**Functional Area: Marketing**

Title	Design and carry out customer satisfaction surveys
Code	105501L4
Range	This unit of competency is applicable to those who are responsible for developing and launching customer satisfaction survey. It involves collection of customers' opinions on relevant insurance products/services to maximize current customer retention and facilitate products/services enhancement.
Level	4
Credit	3 (for reference only)
Competency	<p>Performance Requirements</p> <ol style="list-style-type: none"> <li>1. Possess knowledge in customer satisfaction survey <ul style="list-style-type: none"> <li>• Understand concepts and applications of customer satisfaction survey</li> <li>• Comprehend how customer satisfaction survey facilitates insurers to evaluate products/services quality</li> <li>• Define survey intent and scope</li> <li>• Familiar with different communication channels</li> </ul> </li> <li>2(a). Design customer satisfaction surveys <ul style="list-style-type: none"> <li>• Define objectives to conduct customer satisfaction surveys</li> <li>• Determine variables to facilitate segmentation for data analysis</li> <li>• Identify specific information required from the surveys</li> <li>• Decide timeframe and frequency for the implementation of surveys</li> <li>• Estimate relevant cost and resource requirements for administering the survey</li> <li>• Engage with service providers if expertise does not rest with management department</li> <li>• Select appropriate survey formats to obtain relevant information: <ul style="list-style-type: none"> <li>• face-to-face interviews</li> <li>• telephone surveys</li> <li>• written surveys through mail/email</li> </ul> </li> <li>• Determine sample size and sample frame for the surveys</li> <li>• Design survey questions</li> </ul> </li> <li>2(b). Launch customer satisfaction surveys <ul style="list-style-type: none"> <li>• Pretest customer satisfaction to evaluate effectiveness of survey in obtaining customer opinion</li> <li>• Coordinate with relevant units/external service providers to launch surveys through predefined channels</li> <li>• Employ appropriate methods for data analysis</li> <li>• Compile survey report to elaborate survey findings</li> <li>• Evaluate effectiveness of customer satisfaction surveys based on the quality and quantity of collection information</li> </ul> </li> <li>3. Carry out customer satisfaction surveys to assist evaluation of product and service qualities <ul style="list-style-type: none"> <li>• Design customer satisfaction surveys with relevant data variables to achieve survey objectives</li> <li>• Engage relevant personnel to administer the surveys</li> <li>• Compile reports to discuss survey findings and respective implications on the survey objectives.</li> </ul> </li> </ol>
Assessment Criteria	<p>The integrated outcome requirements of this unit of competency are:</p> <ul style="list-style-type: none"> <li>• Able to determine objectives of carrying out customer satisfaction surveys</li> <li>• Able to identify elements of customer satisfaction survey customer satisfaction survey with reference to objectives and relevant information extraction techniques</li> <li>• Able to engage competent personnel to administer the surveys</li> <li>• Able to compile obtained data to carry out analysis</li> <li>• Able to review and fine-tune customer satisfaction survey based on quality and quantity of collection information</li> </ul>
Remark	This unit of competency is also applicable to general insurers, life insurers and broker.