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「銀行理財專業服務人員應用客戶服務資訊系統」問卷調查

各位理財服務員您好：

幾十年來台灣的金融資訊系統服務，多半以代理與服務客戶的基礎設備層與交易層為主，忽視應用軟體的研發以及不適的發展及投資，由其以金融產業的流程軟體與應用管理為甚，這對於台灣金融服務業在邁入以知識經濟為導向的發展，產生極大的限制與技術瓶頸的落差情形，有鑑於此，金融業應多加關注於軟體應用之實際情況。故本研究目的應用客戶服務資訊系統下，理財服務人員之觀感要素間關聯性為何，希冀所得之研究結果能有效提供金融實務界的參考。

感謝您於百忙之中撥空填寫此份問卷，並擔任本研究參與評定之專家。本研究擬採用 DEMATEL 進行問卷調查，您所填寫的答案與提供的資料，僅供本研究使用，並將填答結果以彙整方式整理分析，以作為銀行實務界及學術界之參考，不作其他用途。填寫問卷會耽誤您些許時間，但您的協助對於本研究有極重要之貢獻，在此致上十二萬分之感謝。

再次謝謝您撥冗分享您的寶貴經驗與看法，謹向您之支持表達最誠摯之敬意。

敬 頌

時 祺

中國文化大學國際企業管理研究所

指導教授：施光訓 博士

研究生：劉冠伶 敬上

附 錄

[問卷填寫說明]

- 1.問卷目的：依據各因子定義，並依據您的專業考量給予各項目影響分數，作為銀行實務界及學術界之參考。
- 2.填寫方式：本研究採取 DEMATEL 問卷設計，請您依照研究題目針對各項目給予 0~4 分的影響分數。

[名詞解釋]

客戶服務資訊系統：本問卷所稱「客戶服務資訊系統」是指目前以網路傳送進行客戶服務之系統，包括問題建檔、資料庫查詢、報表製作及文件歸檔等軟體。

壹、基本資料

- 1.性別：男 女
- 2.年齡：20-29 歲 30-39 歲 40-49 歲
- 3.學歷：專科 大學 碩士 博士
- 4.擔任理財服務員之工作時間約：1 年以內 1 年以上~5 年 5~10 年 10~15 年 15~20 年 20 年以上
- 5.擔任理財服務員之工作年資約：_____
- 6.請問貴公司為：公營銀行 私營銀行

貳、各指標關聯性評估

(填寫範例)					
(1) A	(2) B	(3) C	(4) D	(5) E	(6) F
	1				
3					

(0:無影響；1:低度影響；2:中度影響；3:高度影響；4:極高度影響； 部份不需填答)

範例：當「A」對「B」低度影響，則如上表所示於表中填入1。

當「B」對「A」具有高度影響，則如上表所示於表中填入3。

註1: 無影響(0)代表兩個準則之間是無關係的，如A要件是不會對B要件造成影響。

註2: 低度影響(1)代表準則之間是彼此低度關聯的，如A要件上升則B要件也會上升，不過上升幅度不明顯。

註3: 中度影響(2)代表準則之間是彼此中度關聯的，如A要件上升則B要件也會上升，不過上升幅度較小。

註4: 高度影響(3)代表準則之間是彼此高度關聯的，如A要件上升則B要件也會上升，上升幅度明顯可見。

註5: 極高度影響(4)代表準則之間是彼此極高度關聯的，如A要件上升則B要件也會上升，上升幅度非常明顯。



請您依照上述各衡量指標之敘述，進行相關影響分數之評估，並將分數填寫至下列空格。

參、問卷部分

	1.	2.	3.	4.	5.	6.	7.	8.	9.	10.	11.	12.	13.	14.	15.	16.	17.	18.	19.	
1.																				
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17.																				
18.																				
19.																				

(0:無影響；1:低度影響；2:中度影響；3:高度影響；4:極高度影響；■部份不需填答)

問卷到此結束，煩請您再次檢查是否全部作答完畢，再次感謝您協助，謝謝！

