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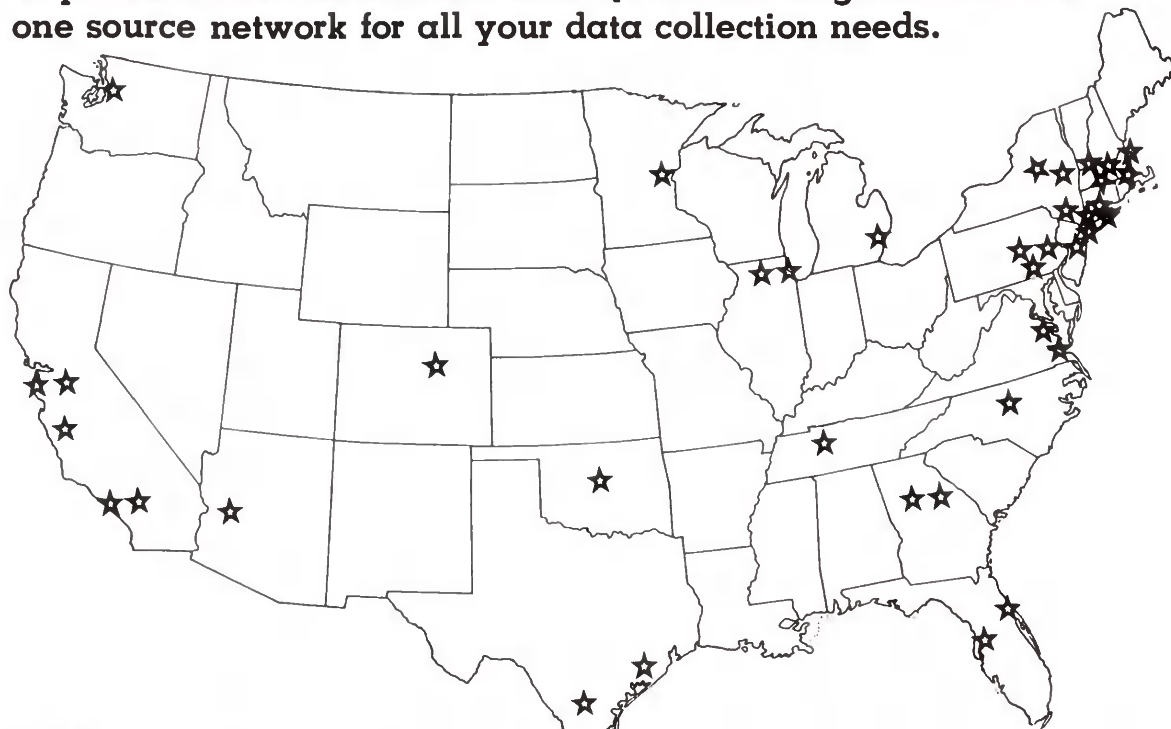
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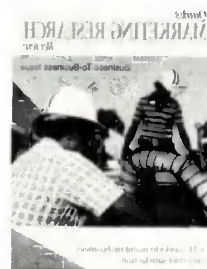
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Cover

Our annual Business-to-Business issue features an in-depth look at GTE's ongoing business customer opinion survey. Cover photo courtesy of GTE

Publisher
Tom Quirk

Managing Editor
Joseph Rydholm

Editorial Advisor
Emmet J. Hoffman

Circulation Director
James Quirk

Printing Supervisor
Robert K. Trublar

Business Manager
Marlene Quirk

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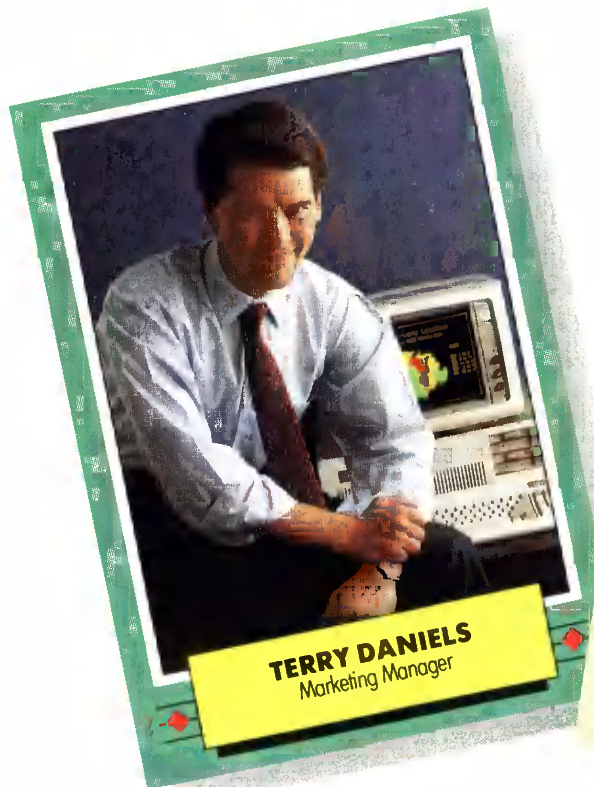
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1986
Entered and analyzed customer-survey data with SPSS to spotlight best openings for new product development. Presented findings to top management as text-and-graphics report.

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GTE tracks business customer

by Joseph Rydholm



In business, if you're doing something wrong, your customers will usually tell you about it, right? Sometimes, but not always. As GTE found out, no news is not always good news.

"We found that many of our customers do not complain to us," says Michael English, director of quality positioning, GTE Corp. "When we've gone to interview them, we've found problems, like their service is not working properly, but when we've asked them 'Have you reported it to us?' they say 'No' often. You cannot rely on the number of complaints you get as a barometer of how you're doing."

In other words, don't wait for your customers to tell you what's on their mind. You must ask them yourself. "We could no longer assume we understood what customers needed and wanted and, as

time went on, what were new, emerging needs and expectations. In order to do that, you have to go out and talk to customers, and a customer satisfaction tracking program clearly is the most effective way of doing so," English says.

In GTE's case, though they had long been involved in residential customer satisfaction research with their Tel-Cel program, the de-regulation of the telephone industry increased competition, making it imperative to find out how they rated with their business customers.

"What we're trying to do now," English adds, "is operate the business as though it's competitive-because it is becoming increasingly competitive-and to try to treat customers as though they do have a choice. In some cases they don't have a choice today, but they soon will, and in the case of business customers

they have a wide range of choices for almost anything they need."

Two programs instituted

With the help of Total Research Corporation's Service Quality Management program, GTE instituted two programs to gauge their performance in the eyes of their business customers: the Business Customer Expectations Survey (BCES), and the Business Customer Opinion Survey (BCOS), an on-going survey aimed at tracking satisfaction levels.

"I think what created the need for this kind of work," says Hugh Devine, executive vice president of Total Research Corp., "was the increase in Japanese competition in particular, where American consumers were starting to move to higher quality products and services and move away from the American products

approval with BCOS

Spreading the word within GTE

Introducing a company-wide program devoted to service quality doesn't mean anything if the program doesn't get company-wide acceptance and understanding. To make sure BCOS gained that crucial acceptance, representatives from GTE and Total Research gave multiple presentations at each of GTE's operating companies in 1986, at the program's inception.

"We took Hugh Devine and members of his staff," Michael English says, "and we did a slide presentation and had the key management in from those locations and we talked about the objectives of the program, what it was to do, and how to utilize it as a tool to drive improvements in quality."

"We did a lot to introduce it so they'd understand what the program consisted of, and we told them what our design and methodology was, how many interviews we were going to do, how it would be tabulated, and how it all would be weighted."

Meetings were also held to determine in what form the information would be delivered to the GTE employees. "We're treating these people as internal customers of ours within GTE, and as we went around we had discussions about what information would be most meaningful at what time intervals. We got comments like 'If you put this question in or take this one out, that will make the report more valuable for us,' or 'If we could get this information on a quarterly basis rather than monthly, it would be more useful.' That's led us to where we are today, where we have these three key reports that come out during the month, two of which contain quarter ending results as well as 12 month-to-date results."

The monthly reports are issued as:

- an advanced management report that comes out within five working days of each month containing the previous month's results;
- a summary report, in a more graphical design, showing the results for the key units on key questions.
- detailed respondent data on disk or magnetic tape made available by operating unit.

Total Research, says Devine, played a key role in designing the reports, working carefully with GTE to make sure the information was getting to the right people in the right form. The company also maintains contact with the service and marketing coordinators at each GTE operating company, as well as personnel at GTE headquarters.

"We like to be responsive to the users within GTE," Devine says, "to make sure they're getting the information in a timely fashion and in a content and style that they can use it most readily, ranging from hard copy

reports to magnetic tapes and floppy disks."

The data can be tailored to meet each group's specific needs, English says. "Our medium and large client results are linked to an account management system, so that the people working on those accounts in a sales capacity get results on them as they occur, for use in conferring with the customers about what they need."

The care and attention paid to making BCOS work for the GTE employees is critical to the process of what English calls "institutionalizing" the program. For a service quality program to succeed, he says, "You have to integrate it into your fabric and culture of how you do business."



and services."

In the early 1980s, Devine says, businesses began to realize that there were differences between marketing a service and marketing a product. "Some of the techniques and approaches that had been developed, in particular by consumer

packaged goods companies, were not really appropriate for service companies. Therefore they were looking to develop new approaches and new techniques which would be specifically applicable to services marketing."

One of those approaches was an in-

crease in emphasis on customer satisfaction. "Total Research Corp., understanding the needs of the marketplace, based on research we did, began to develop the Service Quality Management program about five years ago. Management in

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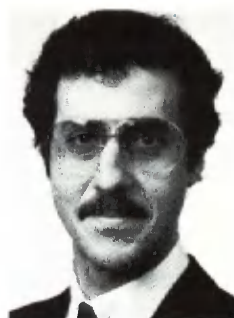
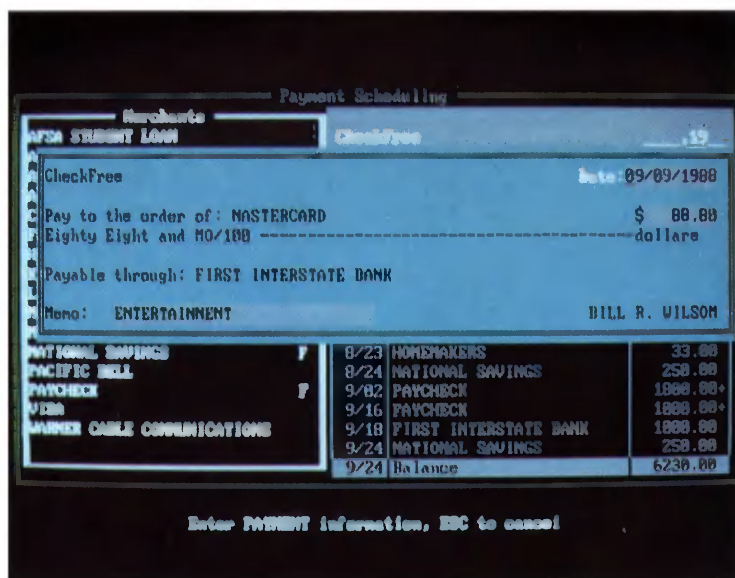
Research defines market for CheckFree

As an electronic funds transfer service providing businesses with an efficient, cost-effective method of payment collection, Checkfree Systems initially proved successful in the health club market, where club owners recognized the advantages of such a service. By letting customers use Checkfree Systems to automatically pay their monthly dues (either by automatic charges to their checking account or credit card), the club owners kept their membership retention rates steady and eliminated a lot of paperwork.

CheckFree (shown in sample screen at right) functions as an electronic checkbook, automatically updating with each payment.

Once the service had success there, it moved on to other areas, handling the payments for subscribers of on-line computer services such as CompuServe and GENie. But, as Checkfree Corporation knew, there were even greater opportunities out there.

"Quite frequently," says Michael Sapienza, vice president of marketing, Checkfree Technologies, "people would call in and say 'I've been paying my CompuServe bill, or my health club membership, using CheckFree for so long, I'd really like to have all my bills paid that way, so get out your pen and paper and take down all this information so you can handle the rest of it.' And of course our response was 'Gosh, we're not really set up to do that.' But the calls became more frequent."



Sapienza

Electronic checkbook

And thus the idea for CheckFree was born. For \$9 a month, the service lets you pay up to 20 bills (quantities above 20 cost an additional \$3 per 10 or portion thereof), using your personal computer (PC) and a modem. Like an electronic checkbook, it keeps a record of all of your transactions, automatically updating the balance with each payment made. Because CheckFree works directly with the Federal Reserve, it is connected with all financial institutions, so anyone can use the service regardless of which financial institution they use or where they live.

All data entry is done off-line, keeping financial records stored safely in your PC, and the software has been designed so that the coded burst transmissions to the CheckFree Processing Center contain only payment information.

Not a new idea

The idea of paying bills via home computer isn't a new one. Many banks have tried-and failed-with a similar service. The reason most attempts have been unsuccessful, Sapienza says, is that even a bank with a large customer base has a finite number of depositors who own the computer equipment necessary to use the service.

"At best," he says, "15 to 20% of their depositors are going

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CheckFree

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to have PC's, and of those, probably only 30% will have modems, so that cuts it down even further. There's just not enough volume level. We're the first ones to do it on a bank-independent basis. We don't have those restrictions and that makes it a lot more feasible."

Tracking study

In 1984, after the idea for CheckFree was hatched, a tracking study was done to ascertain market demand. One sample was made up of on-line computer service subscribers who had the equipment necessary to utilize a service like CheckFree. Another consisted of a general market sample of approximately 1000 men and women aged 25 to 49.

Without identifying CheckFree, the researchers asked the groups basic questions, such as "If this kind of service was available, would you be interested in it?" They were also asked to define the key features they thought such a service should have, and talk about what things would make it most appealing.

The respondents expressed definite interest. Depending on the sample cell, Sapienza says, between 8 and 15% said they would definitely buy such a service-but with a number of stipulations:

- The service had to be bank-independent. "Nobody wanted to utilize a service to pay their bills where they had to move their money from their current bank to another bank just to use the service," Sapienza says.

- There could be no limitations on the types of bills payable with CheckFree. "If you can only pay your utility and your phone bill, what use is it?"

- There had to be a flat rate, instead of a per-payment charge. "They wanted to know that it was going to cost X dollars per month."

- The system had to be software-based, allowing most of the work to be done off-line so that "only after you were done en-

tering all of your payment information do you transmit the information to the service provider. People want their computers to act as intelligent machines, not as dumb terminals."

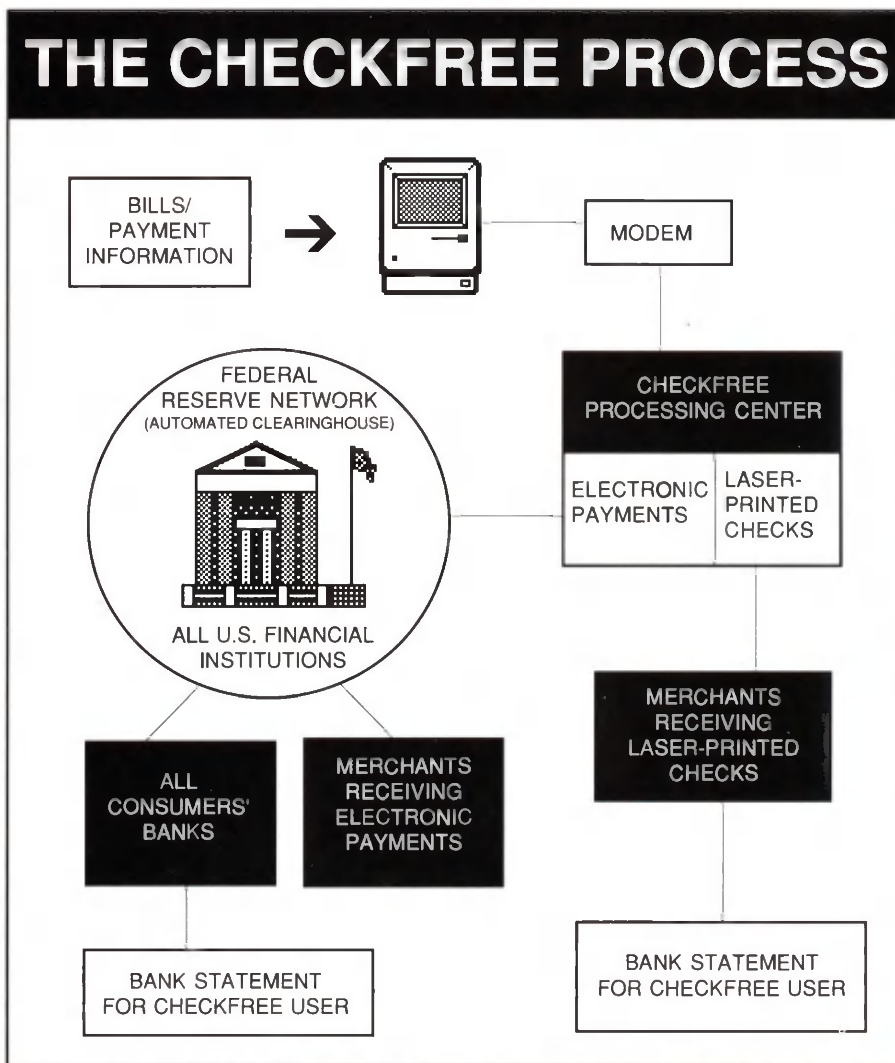
Two more studies

These findings were taken to the development people, to see if the needs of the test market could be met. They could, and by early January of last year, the prototype was nearly ready. But Sapienza did two more studies to verify the 1984 findings and make sure the market was still there.

The first study was conducted in shopping malls in four cities with a high incidence of PC users (Atlanta, San Francisco,

Washington D.C., and Chicago). After a screening process to make sure they didn't work for a bank, advertising agency or market research firm, the 300 respondents (who were required to either own or have access to a PC) were shown the CheckFree service in the form of an advertising concept.

The second study was a telephone survey of some 300 users of an on-line information service, who were asked similar questions, with similar results. As with the 1984 research, respondents were asked questions about purchase interest and what other concerns.



Convenience and security

What most appealed to people about the service was the convenience of it. "The fact that they didn't have to go through the pain of sitting down for three hours every month and writing out all the checks. They could do it in 15 minutes and the software would automatically update everything."

The number one concern voiced by the respondents was security. They wanted to make sure their financial records were kept confidential. Some, Sapienza says, expressed fears that CheckFree was some kind of ominous Big Brother-like system.

These findings were used in the development of CheckFree's

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COMPUTER INTERVIEWING EXPERIENCES

SIXTH IN A SERIES

The ability to express one's feelings and thoughts is important in interpersonal relationships. At Hallmark, we are constantly working to understand how people want to express themselves and how these expressions change over time. As a result, we need to stay in touch with consumers.

Over the past several years we have found that computer interviewing has made a significant contribution to our ability to stay in touch. In particular, it has helped us to respond more quickly to the fast-changing needs of our market, allowing us to turn change into marketing opportunity.

ELIMINATING THE DATA PROCESSING LOGJAM

We first experienced the benefits of computer interviewing when we converted an often-repeated study from its usual paper-and-pencil format to a computer-administered format. Previously, this study required days of questionnaire data processing before the data were ready for analysis; in fact, this study nearly always created a logjam in our DP department. We found that with computer interviewing, our data processing time was cut dramatically: there was no longer need for key punching, and data cleaning was drastically reduced. Not only has this allowed us to have our results earlier, it has eliminated the logjam we all used to dread.

KEEPING UP WITH THE FAST-PACED WORLD OF PROMOTIONS

Recently, Hallmark has been doing more in the area of promotions. Because the promotions business is so fast-paced, we needed a new way to test our ideas. Here too, computer interviewing was able to offer a speed advantage.

We've found that with computer interviewing and a modem, we can start to process our data while our studies are still in progress. And, because we can test our cross-tabs or other analysis procedures before data collection is complete, we can take care of any analysis problems without affecting the study deadline. Now that we're using computer interviewing for these studies, we're able to present results just five days after the field work



David Santee, Hallmark Cards

begins. Without computer interviewing, this kind of speed just wouldn't be possible.

POINT-OF-PURCHASE STORE EVALUATION

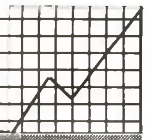
We've been so pleased with the advantages of computer interviewing that we also made it a part of a new approach recently pilot-tested.

To better understand consumers' perceptions of our Hallmark stores, we decided to conduct interviews with them at the point of purchase. We did this using a self-administered computer interview of customers. We were delighted to find that the PC interview led to a much lower qualified refusal rate than traditional interviewing methods. We think that the computer interview improved the quality of our sample, while simultaneously eliminating interviewer bias. And, of course, the turnaround time was much faster than what we could have achieved with other in-store interviewing methods.

Computer interviewing certainly can't solve all of the challenges Hallmark encounters in its survey research, but it does allow us to collect high quality data more quickly, and at a lower cost.

David Santee
New Business Strategist
Hallmark Cards, Inc.

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Marketplace segmentation by demographic characteristics

by C. Ying Li



C. Ying Li is a demographic statistician at National Planning Data Corp, Ithaca, New York, where she is responsible for information product design and analysis. Marketing and related research are her primary interests. She immigrated to the United States from Taiwan 10 years ago, and has since obtained an M.A. in Chinese history from University of California at Davis, an M.S. in statistics from Cornell University, and worked considerably in computing, social/economic research, and teaching.

Not long ago, the most a market researcher could do for his/her client was to conduct a few surveys at strategic points, describe the results, and then come to some impressionistic conclusions. Such a simple procedure nonetheless allowed an experienced researcher to do a reasonable job.

Today, however, researchers are equipped with an abundance of information supplied by third parties (e.g. government censuses and private forecasts) and sophisticated tools (e.g. multivariate statistical methods). But even the best trained statisticians are not always certain how to properly use these materials and methods. Clearly, researchers must take advantage of such technical advances, especially when they can be easily employed by friendly and powerful computers.

As a researcher who sees more and more data being collected and analyzed everyday, I am encouraged by the increased use of these new sources of information and techniques, but troubled by the frequent lack of understanding of them apparent in much research.

This article focus on a popular kind of canned demographic data: geo-demographic clusters. Geo-demographic clusters are marketed by their developers as the definitive answer to market-segmentation problems.

Demographics at a quick glance

Demographic data, used judiciously, can shed important light on a marketing phenomenon. They relate a product in a market

area to its demographic profile defined primarily in terms of housing and population characteristics. As we all know, the Census Bureau provides the best data for two reasons.

1) Only the Census Bureau, a federal agency, has the resources to collect data on 100% of the population, therefore making projection unnecessary.

2) Even if population data are occasionally approximated from samples, they are calculated by trained staff following strict sampling procedures. The mathematical properties of these sample designs enable the Bureau staff to make the best population estimates with the least loss of information.

However, Census data may not be up to date, or they may not be oriented to the specific product-buying populations that concern market researchers. Currently, private data companies supply most postcensal, small-area projections and consumer/marketing information. The quality of their data depends a great deal on the models and techniques employed.

Most commercially available demographic data involve projection. A projection is a probabilistic statement about a larger phenomenon concerning the population. It is calculated by experts from past data samples under a set of restrictive assumptions. Since no set of assumptions are complete enough to account for all the forces that influence social and economic events, the projection is bound to be somewhat biased.

Despite imperfections, a soundly calculated projection is the best technique available for guiding research. A projection is considered sound if its underlying models are well understood and its assumptions can be demonstrated to be relatively realistic, and if its data are collected under a carefully planned sampling scheme. Such projections must be subjected to rigorous statistical tests, and measured against corresponding empirical data whenever the latter become available. Potential projection errors can also be estimated. From the users' standpoint, those market researchers who depend on private companies to supply their research data should make a serious attempt to learn the

continued on p. 14

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Data Use

continued from p.12

projection assumptions (hence, the possible limitations). Such precautions forestall unanticipated results.

Lifestyle geo-demographic clustering

In the early 1980s, psychologists popularized the use of a multivariate technique called cluster (or classification) analysis in order to classify individuals into personality types based on a multitude of character measurements. The purpose of clustering is to discover some "natural" groupings among individuals so that the variation within groups is minimized while the variation between groups is maximized. In other words, individuals within the same group are closer to each other according to some measure than any is to members of other groups.

A number of private data companies applied this technique to data from the 1980 Census. They defined the basic unit of geography for their analysis to be as small as a block group in an urbanized area or an enumeration district in a rural area. A key assumption was that within these units the population tends to manifest similar characteristics. They then clustered such geographic units for the entire nation into an arbitrarily determined number of so-called "lifestyle neighborhoods." "Lifestyle" is simply demographic characteristics, "neighborhoods" is the non-jargon expression for clusters. The final clusters (or groups) are subsequently identified with attractive yet vague labels. For example, the "Town and Country" cluster implies

the rich and famous.

What the data companies have done amounts first to condensing hundreds of 1980 Census variables into six or seven "dimensional" factors by a factor analysis. These dimensions include mainly housing, income, age, education, social status, household composition, and ethnicity. These dimensions were claimed to embody the full explanatory power of all Census variables. After extracting these dimensions for all block groups/ enumeration districts in the country, the data companies further condensed them into a single measure of "distance." They were then able to group all those geographic units into a finite set of clusters, usually by using some kind of clustering computer program (of which there are many varieties) to distinguish the distances among the units.

Users of such methods know that no matter which cluster the blocks in question belong to, that cluster, as its description may indicate, specifies only the lifestyle of a large part of its residents. This description is in no way complete. For example, certain blocks of a city may be classified as belonging to "the rich folks" even though there are some poor people in the same community.

Once each of the smallest geographic units in the nation has been labeled with a cluster identity to highlight its predominant population, the data companies can break any user-defined marketplace down into block-group units, retrieve their cluster identities from the database, and aggregate the unit household counts for all clusters in that market area. They can also provide individual household addresses of the desirable clusters for di-

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Geo-demographic clusters are useful to researchers interested in segmenting markets for two reasons. First, for a given marketplace it is reasonable to assume that people's decisions to buy are linked to their demographic characteristics. This assumption justifies the comparison between consumer behavior and demographic characteristics. If this association is in fact true not only within a local unit, but also among units with simi-

fine appropriate market segments than it is for a marketer to conduct such extensive research independently.

Users of cluster systems can verify the existence of an association between demographic characteristics and consumer buying patterns in a market area by calculating the Spearman's rho, a statistical quantity that measures the correlation of two types of clusters based on ranks. Table 1 illustrates such calculations with an example.

The upper portion introduces a standard report from any cluster system with fictitious data. The lower portion shows the calculations of the Spearman's rho for those data. Market area households on the left are usually supplied by the data company while magazine-subscribing households on the right are supplied by the user. A large volume, positive or negative, of the Spearman's rho (ranging from -1 to 1) confirms the association, and hence the validity of such clusters for segmenting that market. Sometimes visual inspection of such an association may be sufficient. However, I would still recommend formal calculations.

What if no association is revealed by such techniques? How does one know whether there is a problem with one's own product data, or whether the problem lies instead with the generic clusters? If the problem is with the product-ownership data, one must rely on the canned clusters. There is no knowing how strategies based on them will perform. If the problem lies with the clusters, then it is a good idea to check the clustering criteria and appropriateness of these clusters for the market in

Table 1
Rank correlation between total and certain magazine-subscribing households in a selected market area

Cluster	Market area households		Subscribing households	
No. Description	Count	Cluster Rank	Count	Cluster Rank
1. Rich/ high-value housing	5896	3	593	3
2. Middle-income old	21550	1	627	2
3. Middle-income young	17480	2	731	1
4. Middle-income blue collar	626	5	53	5
5. Renters	470	6	5	8
6. College-bound	52	10	0	10
7. Minority, mobile homes	156	9	4	9
8. Immigrants, dense housing	157	8	7	7
9. Retirees, low-value housing	323	7	45	6
10. Low-income young	1878	4	71	4
Total	48588		2136	

Let $N = 10$ pairs of clusters.
 $T =$ Sum of squared cluster-rank differences
 $= (3-3)^2 + (1-2)^2 + (2-1)^2 + (5-5)^2 + \dots + (7-6)^2 + (4-4)^2 = 8$,
 Spearman's rho $= 1 - (6 \cdot T) / (N \cdot (N^2 - 1)) = 1 - (6 \cdot 8) / (10 \cdot (100 - 1)) = 0.9515$

lar demographic profiles across the country, then such clusters can be treated as natural market segments for planning purposes. Second, it is much easier to have the data company de-

continued on p. 16

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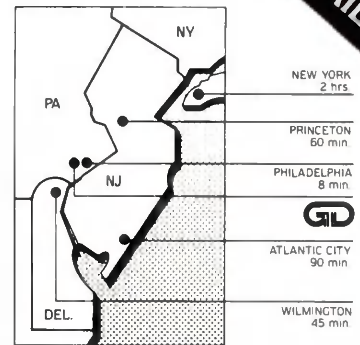
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Data Use

continued from p. 15

question. (This is, unfortunately, difficult to do since very few data companies are willing to disclose their "proprietary methodologies.")

Clustering is not a single, cohesive set of techniques, but rather a collection of methods, each having an ad-hoc flavor for mending some inadequacies in the data. One cannot cluster without making subjective, sometimes arbitrary, decisions on:

1) How many clusters should there be? For example, should there be 40 or 400 clusters to represent all possible lifestyles in the U.S.?

2) How does one reconcile the different measurements in different units into a single distance (similarity/dissimilarity) measure?

3) How does one decide on the appropriate boundaries for clusters, the descriptive label of each cluster, the method of clustering, and the criterion of statistical significance (that is, the measure of cluster compactness) of these clusters?

Because both the descriptive and statistical inferences employed by clustering techniques lack explicit structure, it is difficult to evaluate measures for describing cluster compactness, much less the predictive properties of clusters.

Because both the development and employment of clustering techniques involve so many such arbitrary or impressionistic assumptions and decisions—each decision may lead to completely different grouping—it is especially crucial to know what those decisions are and upon what assumptions they were

based. It is very unlikely that a single set of clusters based only on demographic characteristics can work well for all products. The most effective segmentation strategy should vary from one product to the other.

However, clusters tailored to a specific product can be derived by applying a discriminant analysis, a multivariate statistical technique similar to regression, to those initial clusters formed on only demographic characteristics. A discriminant model can effectively employ the product-ownership data (e.g. product needs, frequency of use, prices, consumer preferences relevant to the product) to modify those demographic clusters. The independent variable in the model is the product-ownership data while the dependent variable is the demographic clusters. Such modified clusters should be more sensitive to particular marketing needs.

Some data companies have indeed improved their generic clusters with syndicated consumer data (e.g. data on car sales registrations, magazine subscriptions, real estate transactions, and media surveys.) Some companies claim to employ as many as 60 different sources in their discriminant models. However, if a model contains so many independent variables, each behaving quite differently in defining its customer base, then its ability to adjust clusters must be severely diminished because some variables might cancel the effect of others. Again, without knowing the mathematical forms of these models, it is difficult to evaluate their effectiveness.

It is no exaggeration to say that data users are at the mercy of

continued on p. 22

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Implementation planning: the key to maximizing computer system success

by William Springer

A great deal has been written about how to select computers and computer systems. Most of it is good advice and worth following, but following it does not always ensure success. Yes, the computer and the software are important, but they seem to get all the attention. When the selection is finally made, executive attention moves on to the next issue. This is where problems begin. Not enough attention is given to planning the installation of the system. The result can be that the investment in hardware and software yields less than the expected results.

To ensure that this does not happen, it is important to consider the total project—all the issues in addition to software and hardware that are key elements in achieving success. These key elements include: the need to define in some detail what life will be like with the system installed, the development of an implementation plan, selecting a champion and celebrating success.

If you can't describe what life will be like with the system installed, then you really don't know what it is you want. Ask a 16 year-old boy what kind of car he wants and you won't have to wait long to get a very clear and detailed answer. It is this kind of intense interest, thought and detail that is needed. When the key people involved in a project can match the 16 year-old's detail and interest in describing what life will be like, then you are on the right track.

You are now in a position to develop an implementation plan, an important step to ensure maximum success. The implementation plan can be a simple document two to five pages long that covers some basic points. The written plan is a way to focus executive and middle management attention on the key issues necessary to make the project a success. It ensures that everyone involved has the same expectations for the system in terms of timing, methodology, and changes in the organization that need to occur to achieve success.

The first point is that the plan must be written and available to those involved in the system implementation. If the plan is not written, there is a question that a plan really exists. If it does exist, it may be only in one person's mind. To be effective, the implementation plan must be written and known to all those involved in the implementation process, otherwise there is no common understanding of what is to happen, no common set of expectations and no common definition of success.

It is important to realize that a plan will go through a number of revisions before it is final. Don't let frustration cause you to abandon the process. This iterative approach is part of the process.

The plan ought to cover: site preparation, training, staffing, sequence in which work will be brought onto the new system, and the schedule for phasing out the old system. There is

continued on p. 21

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- Other _____

Questionnaire preparation

- Last minute changes
- Flexibility
- Aesthetics
- Complex designs
- Assembling
- Typos
- Other _____

2. What is your typical number of respondents per survey?

- Less than 200
- 201-500
- 501-1,000
- 1,001-2,000
- 2,001-5,000
- 5,001-10,000
- 10,001-20,000
- Over 20,000

3. How many surveys do you conduct per month?

- 1-2
- 3-5
- 6-10
- 11-25
- 26-50
- Over 50

4. How do you enter your data?

- Key entry minicomputer
- PC with key entry software
- CRT interviewing system
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Planning

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nothing particularly esoteric about developing and writing the installation plan. It is something most managers can do.

The plan should also define success in a quantified way so you will know when you have achieved it. Not doing this makes it questionable whether or not you have achieved your objectives, or if the project has been a success.

Having written a plan, it needs a "champion," a leader interested in making the project a success, who has the backing and confidence of the corporation executives, who realizes that his/her future with the organization will be advanced significantly by making the project a success. The champion is a hands-on manager—this is not an executive position run by delegation. The champion is the one to whom the executives delegate the task of installing the system and making it a success.

The personal traits usually seen in these champions are: a commitment to succeed, an ability to formulate and execute an plan, problem solving capabilities—they don't let problems demoralize them, and they work to prevent them from happening, but can deal with them when they occur; leadership ability—they must inspire and generate confidence in the success of the project and in others that they can be successful in this project; a positive attitude—they catch people doing things right, they don't just see and talk about the frustrations and problems.

In addition to writing an implementation plan and finding a champion, be prepared to deal with some sensitive issues. What new jobs come into existence as a result of the system being installed and what jobs disappear? How do you deal with long-time employees who no longer fit in any job? If they are put in a job they can't perform, this impedes success. The employee is unhappy and so is the company. There are fair and compassionate ways to deal with this situation; avoiding the problem is not one of them.

Be sure to structure success, not failure. Structuring success means doing more than is necessary each step of the way to be sure each step is successful. Common errors are: establishing a time schedule that requires each event to go off exactly on time—experience tells us this does not happen, so don't plan that it will. Another is understaffing—if you need five trained people in a position to handle the anticipated work load in six months and you have none now, don't hire five people and expect all of them to be trained and competent six months later. Hire six or seven people for the position, recognizing there will be some failures. This is the cost of insurance on the success of the project.

Finally and most important, celebrate success. There will be some frustrations encountered during the installation of the system, so put them in perspective and, to keep a positive attitude, recognize all the things that go well, the jobs well done. Part of structuring success is to ensure that people will be "caught" being successful, giving something to celebrate.

Celebrating success, even small successes, conditions the rest of the organization to accept the system as it begins to touch

continued on p. 22

7

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Planning

continued from p.21

them. Without this, problems with the new system become the subject of conversation and people resist becoming involved with it.

Time spent selecting the right computer system—software and hardware—is important. But developing a sound and functional implementation plan with a competent champion to execute it, is a key ingredient to maximum success. MRR

William Springer has been involved in the sale and marketing of computer systems for market research applications for the past seven years, most recently representing Computers for Marketing Corp. His background includes marketing and management positions in several service industries. He is a graduate of Georgetown University.



Data Use

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data companies in the purchase of cluster systems. However, there are a few ways to avoid buying inappropriate clusters. One can purchase raw demographic (Census) data and do one's own clustering. But this, of course, requires familiarity with cluster and discriminant analyses, and confidence in the quality of one's own product data. Alternatively, one can require the data company to design a cluster analysis on a custom basis, specifying that they form the prototype clusters on the basis of demographic characteristics alone, and modify them later by a discriminant model using only one or two sources of syndicated data relevant to one's own product. If this is impractical:

- 1) Ask the data company to explain to you the parameters they used in their clustering computer programs.
- 2) Ask them to provide examples of successful applications of their clusters to solve problems similar to yours.
- 3) Spot check the detailed distribution tables of, say, income, age, or housing, for selected geographic units to see if the clusters truly represent the majority of their population. It goes without saying that contacting past users can also be helpful.

Good market-segmentation studies combine technique and judgment in a manner suitable to the objectives and information of the research. Clusters or segments that are founded on purely demographic characteristics can be just as misleading as those without them. MRR



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Distill complexity: perceptual maps bring it all together

by Harris Goldstein and Peter Zandan

You've surveyed the universe. The data has been cross-tabbed. You waded through the numbers. The results are clear to you. Opportunities emerge from the facts and figures. Now all you have to do is translate your findings to the boss. You can only get five minutes of her time...

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Perceptual mapping has been used in applied marketing research for about 25 years. Maps have been effectively used

for consumer and industrial product positioning and corporate and institutional image research. Methodologies for mak-

key benefits:

1. They illustrate how competitive products/brands are perceived with re-

Table 1

SIMULATED CHANGES IN SHARE OF PREFERENCE FOR ALL-IN-ONE

A 20% INCREASE IN:	RESULTS IN A SHARE OF PREFERENCE INCREASE OF:
Ease of use	3.0
Performance/speed	2.7
Low price	1.4
Reputation as a company standard	1.1
Publisher's reputation	0.8
Advanced technology	0.1
Availability of support	0.0

ing maps vary, with each having strengths and weaknesses. Yet, most provide four

pects to their strengths, weaknesses, and similarities.

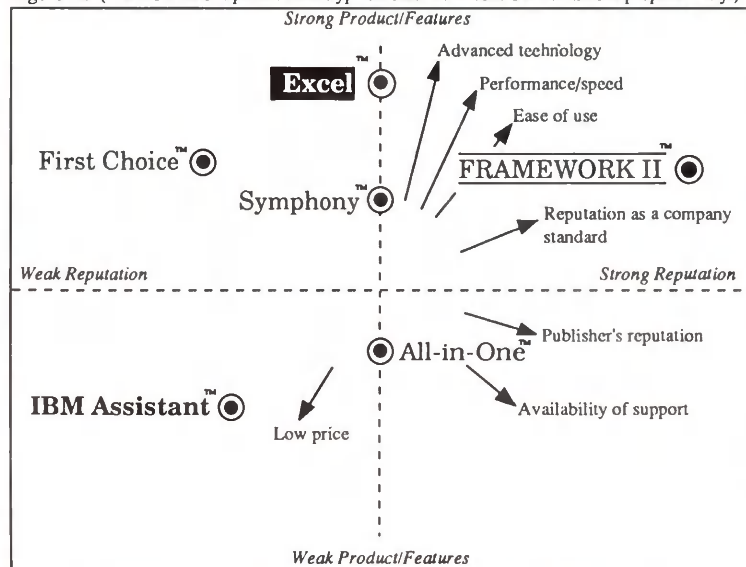
2. They demonstrate the strength of existing images.

3. They serve as a means of assessing new product positioning or the repositioning of existing brands.

4. They allow you to measure the effectiveness of your communication and advertising messages.

Perceptual maps are derived from customers rating how competitive brands are perceived as having certain characteristics. For example, we can have computer users describe their perceptions of software products being low in price, being easy to use, being state-of-the-art and/or having strong support. This attitudinal information is synthesized, sum-

Figure A. (The information presented is hypothetical and is used for illustrative purposes only.)



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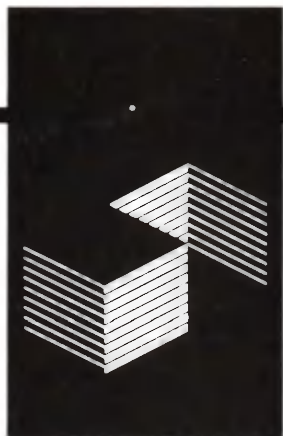
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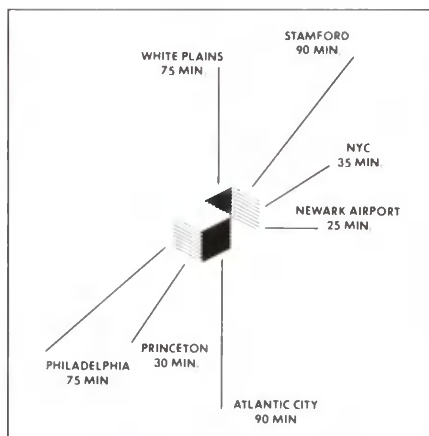
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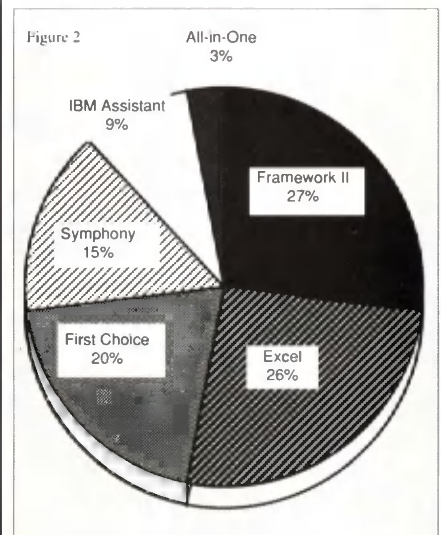
Maps

continued from p. 24

marized and mapped out. The end result is an explicit picture that shows comparisons and contrasts among competitive brands.

Reading maps

The maps are relatively easy to read with a minimum amount of orientation. The horizontal and vertical axes are the



primary dimensions of a perceptual map. These two boundaries often account for a majority of the ways consumers differentiate and discriminate between brands.

For example, the software products mapped in Figure A are compared and contrasted according to the relative strength of their features (vertical axis) and according to their relative stature as reputable industry standards (horizontal axis). The map is composed of four quadrants. Each quadrant is defined by its boundary axes. In this example, the lower left quadrant exemplifies a weak position except on price. The brands in this quadrant are perceived to be the antitheses of the upper right hand quadrant; expensive but strong on features and reputation.

In perceptual mapping, the further a brand is located from the center, in the direction of a specific arrow, the more it is perceived as embodying that specific quality. Brands that are perceived as similar are located close together while those that are perceived as different are farther apart. Brands with vague, undifferentiated images tend to lie near the center of the map. Attributes which are

closely related have nearly parallel arrows, while those that are unrelated to one another are at right angles.

Because perceptual mapping measures respondents' preferences of one brand over another, a statistical measurement (squared distances) provides a share of preference measurement (see Figure 2). Computer-aided simulations of estimated share preference for any brand, versus its competitors, identifies the aspects of the brand's image that, when enhanced or emphasized, will most effectively increase the share of preference (see Table 1).

All-in-One currently holds an estimated 3% share of preference. To most effectively increase its competitive position, All-in-One should enhance its reputation in the areas of "ease of use" and "performance/speed."

The ability to "manage" the perceptions of the marketplace is a key component to successful marketing. The challenge for the research professional is to communicate the complex information that comprises brand image so that management can make informed decisions. Perceptual maps can provide the answer.



Harris Goldstein is president and founder of Trade-Off Marketing Services, Inc. He has been an executive with Columbia Pictures, Times Mirror Satellite Programming, Young & Rubicam, and Market Facts, Inc.



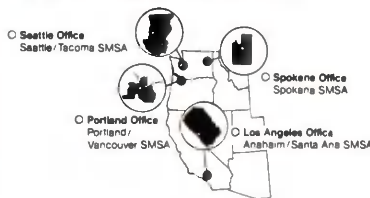
Dr. Peter Zandan is president of IntelliQuest, Inc., a full-service marketing intelligence, research, and consulting firm based in Austin, Texas. He received his M.B.A. and Ph.D. from the University of Texas at Austin.

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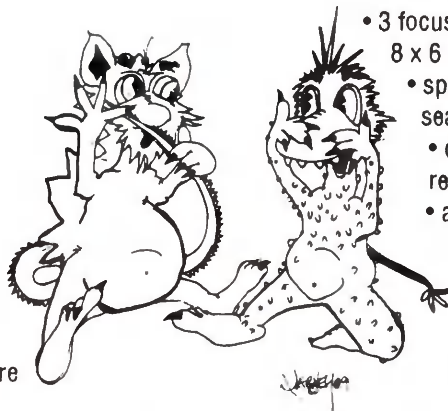
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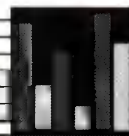
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*Burb (bûrb) v. to expand to the suburbs n. mythical creature possibly Minoan in origin.





Executives give U.S. education system failing grade

According to recent research conducted by Opinion Research Corp., two-thirds (68%) of American corporate leaders feel the American educational system is inferior to those of Japan and Europe in creating "human capital." One executive in six (16%) feels American schools are doing a "much worse" job than their foreign counterparts. 52% believe that the U.S. system is "somewhat poorer."

Just one percent feel American high schools and colleges are doing a better job, while 8% say they do a somewhat better job. 21% place America's schools on the same level as those of Europe and Japan.

Only one in ten believes that the level of public funding schools receive is the prime influence on educational quality. Rather, 42% cite the ability of teachers, and 35% cite the quality of curriculum as the most important factors.

But despite their harsh assessment, the executives do not see educational preparation as the dominant influence on how well America competes. In addition to

skilled, intelligent workers, executives feel a company needs access to capital, a responsible government fiscal policy, and a level playing field with its foreign competitors.

Jobs rate low in importance among Americans

Americans place the importance of their jobs relatively low on a list of 10 significant aspects of their lives, whereas Japa-

continued on p.38

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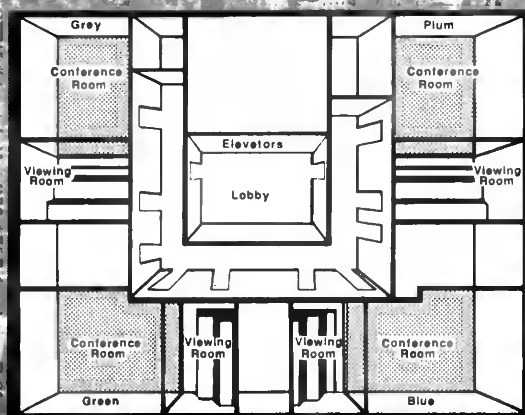
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Northwoods Mall Charleston, SC	✓	✓	✓	✓		✓	✓		✓
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Boston HQ Boston, MA		✓	✓	✓	✓	✓	✓	✓	✓
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*Opening 1989

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CheckFree
continued from p. 10

initial advertising and direct mail communication, accenting the benefits cited by the respondents, while addressing their concerns.

Marketing challenge

Though the research showed there was definitely a market for the product, the largest group of potential customers consisted of people who liked the idea of the product, but were hesitant to embrace it right away. They said they would be willing to test it, but they wanted to wait and see what happened when others bought it.

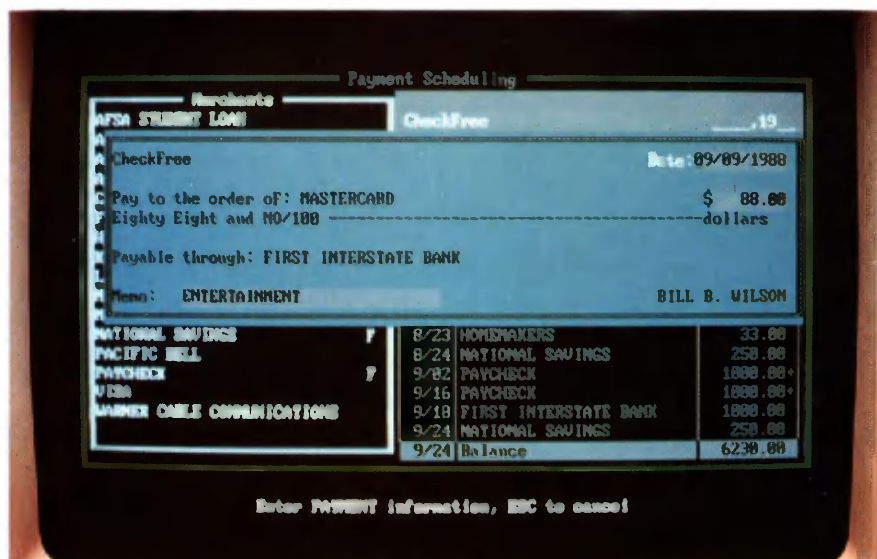
Getting at this group, Sapienza says, is CheckFree's marketing challenge.

"We think there's a core group of people

The company began a basic advertising campaign concentrating on publications that reach PC users, and Sapienza has flown "back and forth across the country" talking to editors of PC magazines to drum up editorial coverage and generate word-of-mouth interest. In addition, hardware or software manufacturers with a mutual interest in CheckFree have been contacted regarding co-marketing arrangements.

"Obviously our service could potentially promote the sale of modems, so we're negotiating with modem manufacturers to either bundle our software or promote our software, and in return, we'll promote their hardware."

Since the advertising kick-off in November, Sapienza says, "we're selling literally hundreds every day." In addition to receiving a good deal of positive pub-



out there who have PC's and modems who would be willing to buy it right away-which is enough to get us going-but our growth will depend upon getting to that next level of people who want to see it and touch it first, and have it be established for awhile before they jump into it."

Marketing efforts

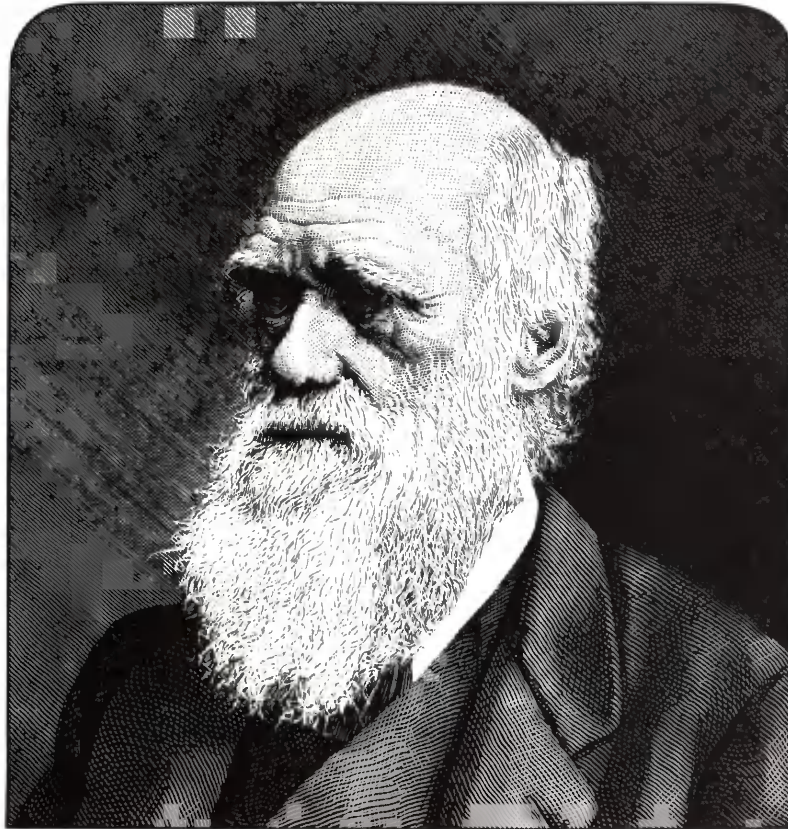
The research also provided a clear view of the demographic make-up of the market-male technology buffs between the ages of 25 and 50 with incomes of around \$40,000-allowing CheckFree to concentrate its marketing efforts in key areas.

licity, they've gotten calls from several retailers interested in selling the product, and through an arrangement recently made with Radio Shack, the product will be available nationwide.

But probably the most convincing evidence that CheckFree is a product whose time has arrived was supplied by a decision by Chemical Bank in New York.

"They recently discontinued their home banking service," Sapienza says, "and they suggested CheckFree as the alternative home banking service to their customers." MRR

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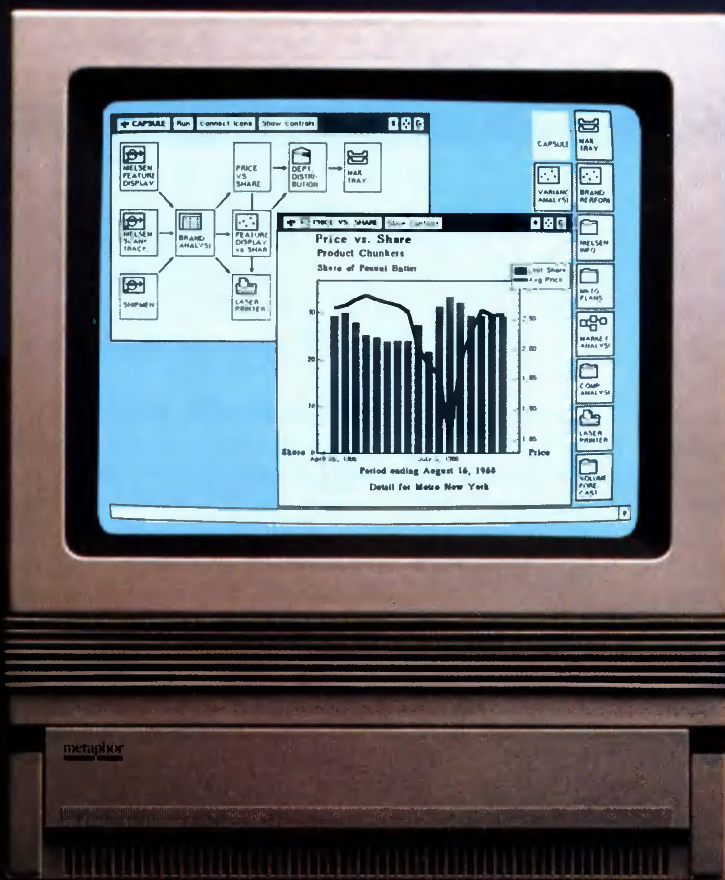
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NAMES OF NOTE

Jeffrey C. Adler joins Market Dynamics, Vienna, VA, as a research associate. Previously he was a senior product manager and statewide marketing officer for Florida National Bank.

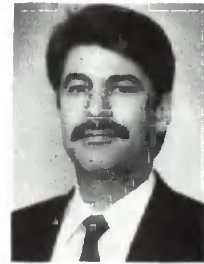
The Vanderveer Group of Georgia, Inc. announces the appointment of **Dr. Richard M. Farmer** to senior project director. Previously he was manager of marketing research at Kimberly-Clark Corp., Roswell, GA.

Minneapolis-based Winona Market Research Bureau, Inc. announces the promotion of **Bruce Lervoog** to vice president.

Consumer Sciences Incorporated announces the following appointments/promotions: **Marion Manigo-Truell** has been named president of the Qualitative Research Division. Previously she was vice-president at Manhattan Opinion Center. At the Boston facility, **Christine Donnell** has been promoted to manager of recruiting, reporting to Senior Manager **Charles Kohler**. **Sam Aaronson** will manage the Long Wharf focus group facility. **Debra Caton** will manage all pre-recruited projects. At the Chicago facility, **Martba Webster** has been named recruiting manager. At the Ft. Lauderdale facility, **Marlene Weiss** is acting

manager of CSI's focus group facility located next to the Galleria Mall.

Steven R. Burch has been promoted to vice president at Moran & Tucker, Inc.



Burch

The Orlando, FL-based Datafax Co. announces the appointment of **Eugene Pilcher** to general manager, and **Leah**



Pilcher



San Souci

San Souci joins the company as assistant director of field service.

The Boston-based Delahaye Group names **Ken Norton** as senior vice president of marketing. Previously he was vice president of media and marketing for Bozell Jacobs Kenyon & Eckhardt, Poppe Tyson and McConnell & Co. In addition, **Brad J. Bierenkoven** becomes manager of technical and financial development; **Alison Webb** has been named senior analyst and manager of quality assurance; **Heidi Rothwell** has been promoted to office manager.

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TRADE-OFF'S HYBRID FOCUS GROUPS result in a complete summary report containing an executive synopsis outlining key highlights and bottom line implications. Optional services include: a personal presentation and/or a summary database diskette of the Trade-Off results.



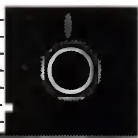
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Electronic transparency

The Audio Visual Division of Dukane Corporation announces the MagniView



400, an LCD Panel that projects high resolution EGA and CGA PC information in 16 shades of color. Interfaced with a PC and placed on top of any transmis-

sive overhead projector, it functions as an electronic transparency, allowing real-time monitor data to be projected onto

any large screen. Users can modify projected images during presentations by accessing the host computer's keyboard. For use in sales and financial presentations, educational and training programs,

computer instruction and other applications, the panel allows EGA PC users a choice of projected shades (colors). The MagniView 400 is compatible with IBM CGA, EGA and AT&T 6300 series computers without the use of special boards. For more information contact Michelle Wilkerson, The Dukane Corporation, 2900 Dukane Drive, St. Charles, IL 60174. 800-356-6540.

PC-based analysis tool

DataEase International, a developer of professional and end-user applications development and connectivity software for personal computers announces Data Ease Cross View, a stand-alone, PC-based data analysis tool. CrossView gives users who lack programming skills the ability to analyze information in a fast, free form fashion. CrossView works logically by identifying key patterns in large volumes of data, allowing users to quickly examine the information in those patterns and make decisions based on it. Users can consider as many variables as they want to access their required information. CrossView also identifies key patterns in data without a predefined report. CrossView gives users a multi-dimensional view of data from any source in standard ASCII format. The user first collects data from micro, mini, or main-frame computer programs, CrossView then concertes the data into an array of unique values by compressing it with its Transformation Module. The system requirements for CrossView include an IBM PC, XT, AT or PS/2 or compatibles with 640KB of RAM, and DOS 3.0 or higher. A hard disk and color monitor (CGA or better) are recommended. For more information contact Jerry Koret, DataEase International, Inc., Seven Cambridge Dr., Trumbull, CT 06611. 203-374-8000.

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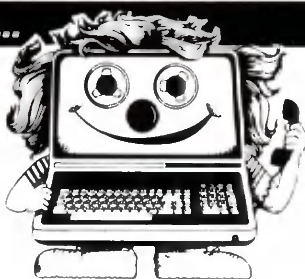
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A change in company ownership has been announced by Response Analysis Corp. RAC's two principal founders, Herbert Abelson and Reuben Cohen, have sold shares representing controlling interest in Response Analysis to the company's Employee Stock Ownership Plan. Both will remain active in the company. Under the new ownership, James H. Fouss will assume responsibilities of chief executive officer.

ADI Research Inc. has moved into expanded headquarters at: Kenwood Towers, Suite 625, 8044 Montgomery

Road, Cincinnati, OH, 45236. Their phone number remains the same 513-984-2470.

James M. Sears Assoc., a Bergenfield, NJ-based market research firm, announces an affiliation with the telecommunications/marketing research firm CENTRAC. The offices of Sears Assoc. will be located at CENTRAC's headquarters: 375 S. Washington Ave., Bergenfield, NJ, 07621-9925.

Michigan-based market research firm

Kennedy Research Inc. has opened an account office at 10921 Reed Hartman Hwy., Suite 226, Cincinnati, OH, 45242. Contact Helena Lawson at 513-891-2275.

Consumer Verite has opened a West Coast office at 2700 North Beachwood Dr., Los Angeles, CA, 90068. Phone 213-465-8719.

Consumer Sciences Inc., has a new 800 number for project scheduling. Call Jane A. Brown, senior project coordinator at 800-227-0666.

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Trade News

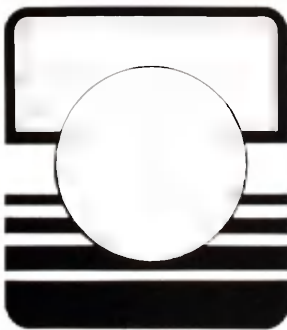
continued from p.28

nese and Europeans indicated a greater appreciation of the role of their vocations, a recent survey shows. The survey, conducted by International Research Associates (INRA) and the Roper Organization, asked respondents to rate 10 different items deemed significant to a person's lifestyle. Respondents rated items on a scale from 1-10, where one repre-

sents the lowest level of importance and 10, the highest. Overall, Americans placed their jobs eighth in importance with a mean score of 5.87. In sharp contrast, Japanese ranked their jobs as the second most important aspect of their lives, with a mean score of 7.63. Europeans ranked it fourth with a score of 6.63. Using the same scale from 1-10, respondents were also asked to rate how satisfied they were with the different aspects of their lives. For Americans, job satisfaction was also

low, ranking in seventh place. Other findings based on a demographic breakdown of the results found:

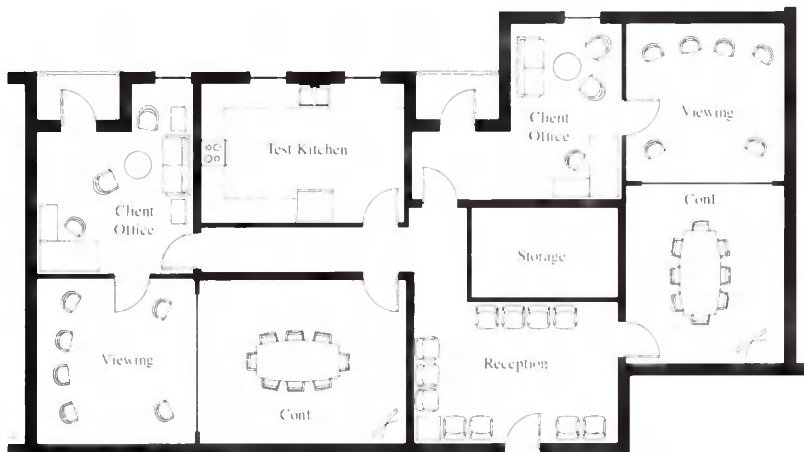
- Men were more likely than women to say they were satisfied with their jobs and that their jobs were important to them.
- In general, the older people are, the more satisfied they are with their jobs.
- White collar workers are considerably more satisfied with their jobs than blue collar workers. The survey sample included a total of 8,000 interviews, with 1,000 interviews carried out in each of the six European countries and in the U.S. and Japan. All interviews were conducted in person.



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Tax law less fair, survey shows

The new tax law that went into effect is less fair than the old statute, said a majority of Americans questioned in a recent survey conducted by the Conference Board. Public opinion about the tax law has become more negative now that it has been in effect for more than a year, results of the poll indicate. The 5,000 surveyed households were asked how fair they felt the new law was, regardless of how it affected them personally. According to the Conference Board, 53% said they felt the new law was less fair than the old one, while 14% said it was fairer, and 33% said they saw little change from the old law. When a similar survey was taken after the law was passed in 1986, one-third of the respondents said that the statute was less fair.

Those with incomes above \$50,000 a year expressed the most dissatisfaction with the new law. In that group, 62% said the new statute was less fair, 15% said it was fairer and 23% said they saw no change. Forty-six percent of the overall respondents in the latest survey said their taxes have gone up since the new law was implemented, while 36% said their taxes were the same and 18% said they were lower.

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Manager, ICI Pharmaceuticals

2. **Outstanding!** Will recommend for the entire professional staff at Ford. Extremely helpful for doing my job. Excellent, well laid out (manual).

Project Manager, Ford

3. **Fabulous** seminar. Covered a wide range of difficult information in only three days. I felt a very personalized learning experience — all due to the (speakers) vibrant, one-on-one communication style.

President, Marketing Consulting Company

4. **Excellent** — Covered more information in more detail and certainly more immediately useful methodology than the two semesters of business research methodology that I had just completed in an MBA program. Exciting, energetic, knowledgeable and effective presentation.

Opportunity Analyst, Dow Chemical

5. **Fantastic!** Even though I have an M.S. in stats, I have never had such a clear picture of how to apply stat techniques before. Wonderful examples to explain the theories, ideas, philosophies — superb (speaker)! Helped to motivate me to expand my use of different techniques and explore more possibilities.

Market Research Analyst, Consumer Power Company

6. **Great** seminar. Concentrated — practical — directed. Engaging (speaker) — it is exciting to have direct contact to such talent.

Market Officer, Marine Midland Bank

7. **Excellent** — exactly what I was looking for. No doubt that (the speaker) knows material inside and out, easily accessible, applied situation in real life to what we were learning.

Project Manager, Procter & Gamble

8. **I can't say enough.** I am much more prepared to understand the analysis needs and interpret the results effectively. Thank you. Nothing was a waste of time.

Assistant Manager, AT&T

9. **Outstanding** seminar. I learned a great deal and this seminar tied together a great deal of information that I had been exposed to but never trained in. Outstanding (speaker) used a lot of analogies that helped with the understanding of a lot of concepts. This course made marketing research more interesting to me.

Market Planner, Corning Glass Works

10. **Covered exactly the kinds of issues** we face in advertising research, and more important, the material was made very understandable because of the context in which each tool was described. The speaker can't be beat.

V.P., Group Research Director, Leo Burnett Advertising

The Burke Institute

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- | | |
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Chicago Mar. 29-31
Philadelphia Apr. 17-19
Cincinnati May 8-10
Atlanta May 22-24
Toronto June 19-21 | 13. Applications of Marketing Research
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Philadelphia April 20-21
Atlanta May 25-26 |
| 2. Introduction to Marketing Research
Cincinnati Mar. 22-23
Orlando June 19-20 | 14. Product Research
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Hawaii Jan. 17-18
Cincinnati May 2-3 | 15. New Product Forecasting
Cincinnati Feb. 23-24 |
| 4. Questionnaire Construction Workshop
New York Jan. 17-18
Cincinnati Feb. 27-28
Chicago April 4-5
Boston May 2-3 | 16. Advertising Research
Cincinnati Feb. 9-10
New York May 18-19 |
| 5. Questionnaire Design: Applications and Enhancements
Cincinnati Jan. 19-20
Chicago April 6-7 | 17. Positioning and Segmentation Research
Cincinnati Feb. 7-8
New York May 16-17 |
| 7. Focus Groups: An Introduction
Cincinnati Jan. 11-12
New York Mar. 21-22
Boston May 4-5
Orlando June 21-22 | 18. Customer Satisfaction Research
Cincinnati Mar. 6-7
Chicago May 18-19 |
| 8. Focus Groups: An Applications Workshop
Cincinnati Jan. 17-18
Cincinnati April 11-12 | 19. Tabulation & Interpretation of Marketing Research Data
Cincinnati Jan. 23-24
New York June 5-6 |
| 9. Focus Group Moderator Training
Cincinnati Jan. 31-Feb. 3
Cincinnati Mar. 13-16
Cincinnati April 25-28
Cincinnati June 13-16 | 20. Tools and Techniques of Data Analysis
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New York Feb. 20-22
Chicago April 17-19
New York June 7-9 |
| 10. Qualitative Marketing Research With Children
Cincinnati Jan. 13
Orlando June 23 | 21. Practical Multivariate Analysis
Cincinnati Feb. 13-15
New York April 24-26
Cincinnati June 26-28 |
| 11. Writing Actionable Marketing Research Reports
Boston Jan. 12-13
New York Mar. 2-3
Cincinnati May 11-12
Toronto June 22-23 | 22. Using Multivariate Analysis: A PC-Based Applications Workshop
Cincinnati June 29-30 |
| 12. Effectively Presenting Research Results to Decision Makers
Cincinnati Mar. 8-10
Cincinnati June 7-9 | 23. Experimental Designs for Marketing Research
Cincinnati May 4-5 |
| | 24. Managing Marketing Research
Hawaii Jan. 19-20
Chicago April 12-13
Cincinnati June 20-21 |
| | 25. Marketing Strategy & Tactics
Cincinnati May 25-26 |
| | 26. Industrial Marketing Research
Cincinnati Mar. 29-31
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Ignoring research findings can be very costly

by Tom Quirk

The following case history in which I was very deeply involved vividly illustrates how a client's internal factors can thwart the results of valid research. Individuals involved in sales and marketing tend to be positive types. They look for the good things about the products and services they sell while minimizing shortcomings of those same products and services. These traits are necessary if they are to be successful in their jobs.

In many consumer-oriented companies, sales and marketing personnel have become accustomed to using marketing research to objectively determine the positive/negative characteristics of their products and services. The cost of introducing a new product has become so expensive that many companies will not introduce a product without some type of evaluation by the marketing research staff. The researchers, in turn, feel confident that the numbers they present as part of their report will be accepted regardless of whether the report is positive or negative.

Not fully accepted

Within some industrial companies the credibility of the marketing research department has not been fully accepted. Marketing and sales functions are sometimes combined. Individuals holding key decision making positions in these areas may believe their personal experiences provide a better gauge of the marketplace than can researchers. Results of this

approach may prove to be very costly.

During my career I was contacted by a major corporation's director of research to conduct six focus groups. The company wanted me to use these focus groups to gain an insight into which features of a new product would be most desirable to prospective customers. The meetings had to be held within a short period of time because the product was scheduled to be introduced within six to nine months.

Prior to initiating the groups I met with personnel assigned to market the product. They explained that the product had the potential of revolutionizing the industry being served. It would do everything people in the industry had been asking for and, although it was considerably more expensive than the products it was to replace, they already had orders from some of the customers who had tested it previously. Further, they told me that the product had been in the research and development stage for five years and that company personnel believed this product might increase company sales by 50% within three years. What they did not tell was that I was the first outsider called in to do any marketing research. I was the only researcher involved before the product reached the market.

At this point I assumed the project would be fairly standard. After the sessions with the company personnel, I prepared an outline which was accepted with few changes. It was determined that a research analyst and the product manager

would accompany me on the assignment. Arrangements were made to conduct six meetings within a one week period.

The first meeting ran smoothly. Nine individuals who attended provided excellent input. Each provided some personal and operational background. Discussion then moved to the present products available and their strengths/weaknesses. Next the participants described the characteristics of the perfect product. Finally, I provided a description of the new product which was to be introduced shortly. Before I had had an opportunity to mention the probable price everyone in attendance said that they would switch to the new product. One man even went so far as to say, "Even if this product costs me 10% more I will make an entire shift immediately to this product."

Ten times more expensive

What these people did not know was that the new product was not going to cost 10% more than existing products but approximately 1,000%(ten times) more. I brought up cost figures toward the end of the meeting but they were brushed aside by the participants, who told me that I must be mistaken. Since we had already spent more than two hours in discussion I decided not to pursue the matter further.

After the meeting I raised the pricing problem with the analyst and product manager. The product manager did not

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accept the comments made and said the price would not be a barrier once the product reached the market. As proof, he cited the orders which had been received from those prospects who had seen the product during the development stage.

Nonetheless, I decided to spend a greater portion of the future meetings discussing how people in this industry saw the new product affecting their business and the actual return they would receive from it. I introduced the price earlier in the product description so that participants could have a proper perspec-

tive as to cost/benefit. We spent as much as 25% of the subsequent meetings on cost aspects.

After each meeting the analyst, product manager and I reviewed what had been said and compared it with previous sessions. In total, the responses had been consistent. The meetings had met the objectives of determining which of the new product's characteristics would have the greatest positive impact on prospective buyers. But also after each meeting there would be disagreement as to the negative effect the price was going to have on potential sales. The product manager continued to take the position that the impact would be minimal while I

stressed the downside and used comments from participants to buttress my point. The analyst listened but did not enter into the discussion.

The sixth meeting was held on a Thursday evening. It was agreed that I would have my report ready to present in two weeks. As was my custom I had listened to the tapes of each meeting immediately after each session, making notes as I went along. Thus the outline for the report was actually done by the time I had arrived back at my office.

The pricing problem continued to concern me. I was not convinced that a ten-fold increase could, or would, be accepted by potential customers. Further, I was convinced that the negative comments made by participants regarding their inability to afford the higher cost was based on true economics and not offered to induce the manufacturer to reduce the price.


Secondary sources

Fortunately, there was considerable data available from secondary sources, both industry and government, which I could use to determine whether the participants were providing me with accurate operational information. In particular I wanted to investigate the cash flow situation since it was necessary that it be sufficient to support the large initial investment necessary for the new product.

The data from the secondary data sources strongly supported the statements made by the focus group participants. Even in the best of economic times one would be hard pressed to pencil in an adequate return. And because of the relatively high initial investment anything less could prove disastrous. I felt strongly that my initial concern about the price being too high was justified.

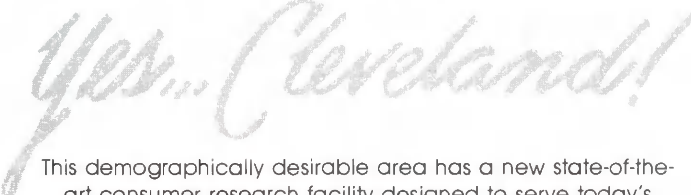
My report was completed on time and I submitted an advance copy to the marketing research department. Within a day after its delivery I received a call from the analyst who questioned me regarding the conclusions I had reached. However, he did not dispute them. Rather he indicated concern and said he wanted to make certain that he understood what I had written.

The day of the presentation arrived and I arrived one-half hour early. After a short session with the research department manager and analyst regarding the presentation format we proceeded to the area where I was to present the results. It was a large room with a stage at the front.



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The room seated 150 people comfortably. At meeting-time, the room was two-thirds full. It was the largest group to whom I ever gave a custom research presentation.

The research manager began the meeting by providing background on the specific project and explaining the objectives of the study. Next, the analyst provided reasons for selecting the various meeting locations and the demographics of those selected to attend the focus group sessions.

To start the presentation on a positive note, I informed the audience that we had met the objectives of the study. I then described the reaction of the focus group participants to the various features of the new product and listed specific ones which created the greatest positive reaction and would be most likely to cause prospects to obtain more information regarding the product.

Finally, I discussed the possible effect of the proposed price on sales. It was left to the end because I knew it would be controversial. But I also wanted to spend the remainder of the meeting discussing it, knowing the other elements had received sufficient attention.

First, I explained the comments made by participants. Second, I presented the information from the secondary data sources to provide support and credibility to my comments. I felt I was able to show rather conclusively that the participants would react in an actual buying situation as they said they would during the meetings. Emotionally, they liked the product's characteristics but there was no way they could justify it economically. Price was going to be the major obstacle my client had to overcome and I was not convinced that the product's strengths would overcome that problem. I told the audience that they should do specific pricing research to determine the optimal price. My research only showed the price was too high but not by how much.

My presentation over, I prepared myself for questions. I was surprised when there was little immediate reaction to my comments about price. The initial discussion related to the physical characteristics of the product. Members in the audience indicated this portion of the research was consistent with in-house observations.

Finally, members of the audience began to question my conclusions regarding the price of the product. One person from the development group said that the

R&D costs already incurred required a price substantially higher than the products presently on the market. A representative from the production department explained that there was no possibility of making any substantial reductions in the manufacturing process. Others, representing various internal groups also stated that the suggested price was necessary if the product was going to be introduced by the company.

Difficult position

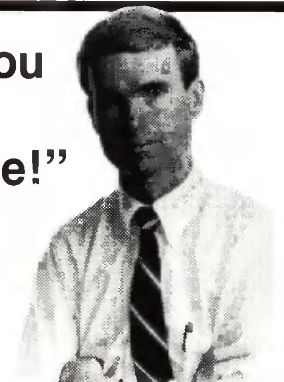
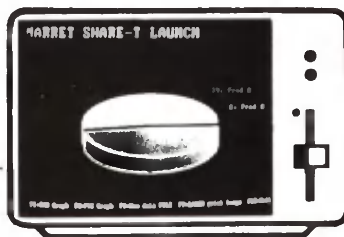
I found my position to be rather diffi-

cult. I was convinced if the price was too high it did not make any difference what R&D costs were, or that the manufacturing processes required a price much higher than anything on the market at that time. I only knew that the suggested price would mean that the product would not capture a substantial market share.

The attitude of the company's management team was summarized by the division marketing director who concluded the meeting by stating, "Look here. There is no way we can go to our company's

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board of directors and tell them that we are going to introduce this product at a substantially lower price than the one we have used to develop our marketing plan. I believe the gentleman making the presentation is dead wrong about the price. Thus we will continue using the pricing assumptions which were approved earlier."

At that point the meeting adjourned. I left with the research department members. The research department manager had me come into his office where he told me that he agreed with my concern regarding the price. However, he did not believe he could or should make any comment. Therefore, he would "bury" my report because the product team did not want it to be leaked to corporate management. My suggestion that a separate pricing study be conducted would be ignored and the product would be introduced according to the plan approved prior to my focus group sessions. As far as the company was concerned my groups had been a waste of money.

It was unfortunate that marketing re-

search department personnel were so intimidated by members of the marketing and product staff that they were reluctant to express their concerns regarding the proposed price. Doing so might have made a greater impact, as insiders, than I create. It would have meant taking risks but they would not have been unnecessary ones. Certainly, it would have provided the researchers within that organization an opportunity to more fully involve themselves in the decision-making process and become more creditable.

The company introduced the new product with a great fanfare. More than 60 salespeople were hired and a corresponding number of support personnel brought on board. When early sales did not meet expectations the company introduced a sales financing program. When that failed to work, other marketing methods were tried. The product struggled along for three or four years failing to achieve a substantial market share. Finally the product was quietly pulled off the market, ending what was undoubtedly a disappointing and losing marketing effort. However, as this case history proves, research can predict future behavior.

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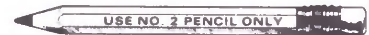
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Unstructured individual interviewing

A U.S. Department of Commerce report, "Approaches to Developing Questionnaires," includes a section on a technique which might prove especially helpful to those involved in Business-To-Business research. A summarized excerpt from this section appears below.

Sometimes a questionnaire designer is required to develop a questionnaire on a topic about which little is known, and about which little information related to questionnaire design exists from previous surveys. In this situation, the development of a questionnaire can benefit from the use of unstructured interviews with members of the intended respondent universe. The term "unstructured interview" is used here to describe a discussion of the proposed survey topics between a member of the target survey population and the questionnaire designer. The discussion is guided by a topic outline rather than a set of specific questions. When sufficient numbers of such interviews are conducted with respondents who are fairly representative of the target population, the technique can provide ideas and insights about how best to structure the questionnaire before the first draft is written.

It is a particularly valuable technique when there are many divergent interests in a survey. When there is more than one sponsor, initial disagreements can exist

about what kinds of information can and should be obtained. This technique transfers the questionnaire design decisions from dependence on the tastes or preferences of the survey sponsors to reliance on the results of the field process employed.

Several questionnaire design issues can be addressed by using this technique. The specific uses of unstructured interviewing include:

1) Topics previously thought to be important for inclusion can be discarded as unnecessary or irrelevant, and topics which had previously been neglected can be identified as important in fulfilling the objectives of the survey.

2) A determination can be made as to whether the information requested in the survey is readily available to respondents and whether particular kinds of questions can be asked.

3) An evaluation can be made of which topics might be especially sensitive to respondents.

4) Assistance can be provided to determine how to phrase particular questions so that the vocabulary is familiar to respondents and the words mean the same things to all respondents.

5) Decisions can be made concerning the preferability of open- vs. closed-ended questions to obtain particular types of information, and a range of answer categories for closed-ended questions can be specified.

6) An identification can be made concerning who in business is in a position to respond most accurately to questions on the survey topics and therefore, would make the best respondent.

7) Suggestions can be made concerning the optimal order of questions or survey topics.

8) Insights about which aspect of a topic appeals most to people may be used to determine the best way to approach respondents in order to encourage their participation.

METHOD

Personnel and skill requirements

A key concept in the successful use of unstructured interviewing is flexibility. The questionnaire designer functions as a researcher during this process, and must keep the objectives of the study firmly in mind while dismissing any fixed ideas about how to structure the questionnaire.

Best results are achieved when several people, including one who serves as team leader/questionnaire designer, work together as team. The team should include interviewers as well as data processing and subject matter specialists if at all possible. This allows diverse ideas and insights to be used in the refinement of the survey instrument.

Persons selected to conduct unstructured interviews should be experienced

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Interviews

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interviewers and be capable of understanding the broad perspective of the research project for which the questionnaire will be designed. This type of interviewing requires skills different from those for structured interviewing (i.e., interviewing in which questions are read verbatim from a questionnaire), and only some interviewers on a regular field staff are likely to possess these skills.

Interviewers selected for this type of assignment should feel comfortable "thinking on their feet" as they will not have a questionnaire script to use as a crutch; if they are easily flustered or confused, they give respondents the impression that they are incompetent or that the study is unimportant. Members of the interviewing team need sufficient experience in unstructured interviewing to be sensitive to the effects of wording changes and to recognize responses that indicate potential problems with question wording or order. In addition, interviewers should be able to tolerate long

pauses while the respondent thinks or looks for answers, have the ability to probe nondirectively to get the respondent's ideas, and have a thorough understanding of potential problems in questionnaire design which can affect the achievement of survey objectives.

Some of the interviewers should be highly knowledgeable and skilled in structured interviewing techniques. This allows informed judgments to be made concerning the kinds of things which can be asked in a close-ended format and what topics respondents can be expected to respond to within a structured interview.

Unstructured interviewing is actually a combined data collection and analysis process. In addition to the interviewing skill necessary for successful results, a "coder" who is capable of making independent judgments is an essential part of the process. This person should be able to analyze and tabulate results of the previous day's work while the interviewers are in the field conducting additional interviews and then meet with them to explain how and where they are failing to meet

survey objectives. The simultaneous conduct of these two tasks speeds up the questionnaire refinement process.

Finally, sponsors or subject matter specialists can provide valuable insights in the frequent meetings held to charter the course for the work.

Selection of respondents

Respondent selection for unstructured interviews generally involves purposive rather than systematic sampling. Although rigorous scientific selection procedures are not necessary, respondents should be members of the population to be surveyed and should be fairly representative of that population.

The characteristics of people asked to be respondents for unstructured interviews may depend on the survey topic. For example, in developing a questionnaire dealing with saving habits to be administered to a national cross-sectional sample, the initial round of developmental work may include interviews with people from a variety of demographic population subgroups. During additional interviews, however, different classifica-

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tions of saving habits may emerge, and it may be necessary to locate and interview persons who are members of specific categories. Thus, the "sampling" of respondents is an iterative process, too—as is the questioning of these respondents.

Respondents may be located by contacting business or community organizations.

Preparation

Before embarking on this phase of a questionnaire design project, the team leader should become familiar with the objectives of the study and make a list of the data elements which are considered necessary to meet those objectives. These data elements include topics and concepts which are particularly vital to the quality of the study, or are otherwise thought to be related to the survey objectives. Prior to the first discussion with a respondent, the team leader should prepare some alternative orders in which the topics might be discussed, as well as any specific words or phrases to be used in relation to any particular topic.

The team leader's next task is to develop the work sheets to be used by the interviewers and coders. Those serving as interviewers should review the materials and meet with the team leader to discuss study concepts and objectives. The interviewers need to be provided guidance, so they will not go beyond the scope of the project.

Operation

Interviewers may begin each interview

by explaining that they are working on a very early phase of preparing a new survey. They should emphasize the reasons for, and importance of talking to people before a questionnaire is prepared.

During this type of interviewing, the interviewer should follow up on answers or comments that seem to have a bearing on how a concept is interpreted by the respondent or how a sequence of questions should be ordered. The interview should have a conversational flavor rather than a question-and-answer format of a formal interview. Interviewers should understand that their objective is not to collect data in the usual sense—rather, it is to become aware of the difficulties that are likely to arise when the survey is being conducted.

Throughout this process, extensive note-taking is valuable, so that insights gained during an interview are not lost or confused with other interviews. Verbatim recording, by shorthand, speedwriting or tape recorder is ideal for this purpose. Even abbreviated note-taking can make it possible for an interviewer to return to statements made earlier by the respondent. Following up immediately on some statements could take the interviewer off the topic being pursued, but "passing remarks" and apparently contradictory statements by the respondent can provide additional insights on how to phrase survey questions.

During each unstructured interview, the interviewer should record how each key inquiry was phrased, as well as the

wording used by the respondent in answering the question. (Since interviewers often respond to the answers of respondents with idiosyncratic or instinctive phrases of their own, it may be more difficult to remember their own words than those of the respondent.) Notes should be made (during or immediately after the interview) concerning the ordering of the inquiries (if different from the outline), how on topic relates to the next, if and how they overlap, what effect topic

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Interviews

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order has on the flow of the interview, the respondent's reaction to specific questions of interest, and the apparent level of difficulty of the inquiry for the respondent.

Tape recording, with the respondent's permission, can be useful as long as time is available to listen to the tapes and extract information from them. Ideally, the team leader, team members who are

conducting the unstructured interviews, and coders should meet frequently to discuss what they have learned to date. The reason for these frequent meetings is to allow all interviewers to gain insights from the experiences of the others and to help one another interpret respondents' comments. Under the guidance of the team leader, changes to the topic outline should be made to refine ideas on how to present topics and sections of the questionnaire, and the order in which to present them. As experience using the topic

outline is gained, interviewers will develop their preferred question wording for topics. They should exchange those wordings during their meetings and then try the wording used by others in successive interviews.

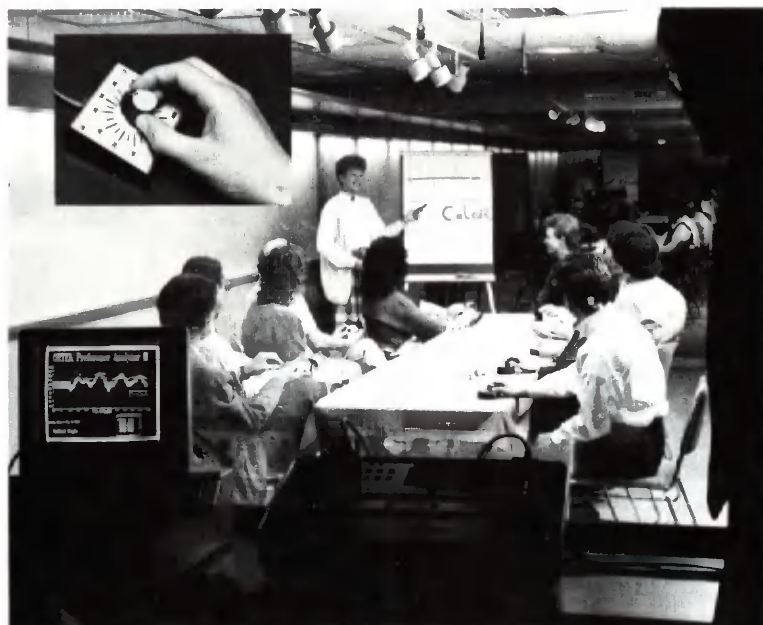
The input of the coder is beneficial in noting ambiguities or superficiality in the responses obtained in previous interviews which require further clarification before the response can be coded. Also, the relative frequency of responses to open-ended questions, the range of conditions imposed by respondents on their answers (e.g., "It depends on..."), and potential response sets can be obtained from the coders' tallies. The coders' analyses and the interviewers annotated transcripts are discussed among team members, patterns are identified, and suggestions are made concerning potential question formatting, sequencing, etc.

No set number of completed unstructured interviews or days of unstructured interviewing can guarantee a good questionnaire. Perhaps the best indicator that enough unstructured interviewing has been done is the lack of new insights and ideas on question wording and order by team members. The responsible researcher (i.e., the team leader) must judge whether the team has fulfilled its mission, and when the process of putting together the first draft of the questionnaire should be undertaken.

Time considerations

The process outlined here may take longer to complete than drafting a questionnaire without any field work. On the other hand, when the questionnaire is drafted after these procedures have been followed, it is likely to require far less modification; therefore, time required for unstructured interviewing may be wholly or partly recovered later. The exact amount of time involved depends on the number of people who are available to conduct interviews, the number of interviews completed daily by each interviewer, and the iterations of the topic outline, question wordings, etc., required before members of the questionnaire design team are confident to construct a questionnaire.

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In general, when the use of unstructured interviewing is incorporated into the development process, two to six weeks should be allowed in the time schedule. This includes the preparation time for the team leader as well as the interviewing time itself. It does not include completion of the initial questionnaire draft, which would be required regardless of whether or not this technique is used. However, drafting the questionnaire should be much less time-consuming, because the knowledge gained from the unstructured interviews will clarify concepts and resolve most of the issues that are typically debated; e.g., which words to use and which to avoid, how much detail to request of respondents, and the order in which to present topics.

Cost considerations

The monetary costs associated with the use of unstructured interviews are essentially limited to the salaries of the personnel who are members of the team. Depending on the number of people involved, the number of interviews conducted, and the amount of time spent in analyzing the interviews, these costs could vary considerably. In addition, other expenditures may be necessary for travel if the interviewing site is not located near the cities of the people working on the project.

One other "cost" should be mentioned

here: the burden on the audience surveyed. Although unstructured interviewing places some response burden on this group, this investment may be more than repaid later if the unstructured interviewing results in a more efficient questionnaire than would be prepared without this type of field work.

Mode of data collection

Regardless of whether the final survey will be conducted face-to-face, on the telephone, or by mail, the use of unstructured face-to-face interviewing can provide valuable insights on how people respond to the topics of the survey. Benefits accruing from establishing the relevance of specific topics to the survey objectives, defining key concepts, and identifying words which have similar meaning for all types of respondents will be equally pertinent for surveys conducted through any method.

Some of the other insights gained through the use of this technique, such as the specification of question order, may be unique to the mode in which the data are collected. If the final survey is intended to be conducted exclusively on the telephone, unstructured telephone interviewing could conceivably be conducted. MRR

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major corporations started to find out that managing quality was essential to the growth of their companies, not only in terms of market share, but also in terms of profitability," Devine says.

Concept of quality

To start out, GTE outlined the concept of quality, breaking it up into five qualifications that needed to be met. To assure quality, the company must:

- Fully meet customers' needs.
- Fully meet customers' expectations.
- Eliminate sources of problems for customers.
- Communicate effectively with customers.
- Anticipate what's important to customers.

"We learned that quality is really something defined by customers and delivered by employees," English says. "To be able to deliver on these five points, you need to know from the customer, not from your own internal measurement system, how well you're doing, and therefore you have to have some way to talk to the customer after service delivery."

BCOS

To participate in BCOS-which surveys more than 20,000 customers each year-the business customer is contacted by telephone at a convenient time by a Total Research representative to respond to the



Michael English (l) and Hugh Devine

15 minute survey. After a screening process to make sure the respondent is responsible for making decisions regarding telecommunications within the company, they are asked to grade GTE (on a scale of A to F) on a number of attributes and areas, including repair and installation services, account management, the sales force, the quality of voice and data transmission, and reliability. They also pro-

vide information on company size and give an overall rating to GTE.

Concerns and attributes

One of the purposes of the Business Customer Expectation Study was to find out what kinds of concerns and attributes should be contained in an on-going tracking study like BCOS. Focus groups were conducted in several GTE markets, such as Tampa, Fla., where telecommunications managers from medium (\$5,000 to \$25,000 per month in billing) and large (\$25,000 or more per month) companies were interviewed. Focus groups were also conducted in communities where GTE was not the predominant provider of local service, such as Los Angeles-where GTE borders the Bell operating territory-including customers of both GTE and the local Bell company in their research.

"The purpose of the focus groups was to determine how customers view service quality," Devine says. "What is it that they consider service quality to be? We were looking to find this out in two ways. One was to understand customer terminology; what language do they use when they talk about service quality? The other was to determine which aspects of service quality were more important to these customers.

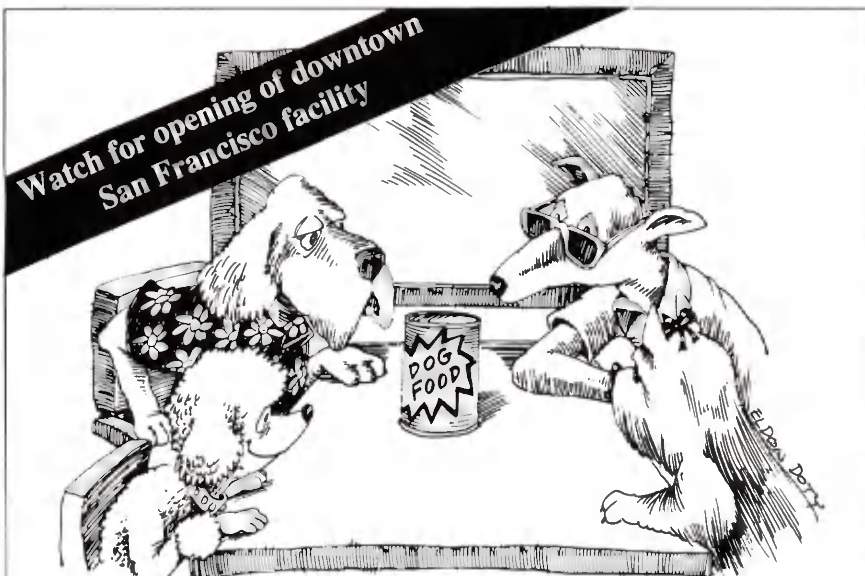
"Based on the results of the focus

"One thing we've learned is that customers speak one language and we speak sometimes within our industry another language. Part of what we're doing is trying to translate customer language into language within GTE we understand and can act on."

Michael English

groups," Devine continues, "we determined there were a variety of different needs that customers had. So we then structured a quantitative questionnaire for the Expectations Study and we identified from the focus groups a long list of service quality attributes that needed to be measured quantitatively."

Some of those attributes were: repair responsiveness in certain situations, hours



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of maintenance coverage, quality of incoming/outgoing calls, network quality, and reliability.

Conjoint exercise

As part of the Expectations Study, approximately 300 quantitative interviews were done in-person with telecommunications managers around the country, in which they were asked to do a full profile conjoint exercise in hypothetical scenarios involving various aspects of telephone service, from the installation of a new office-wide phone system to adding a data transmission line from a branch office to a main office.

"We tried to put people into realistic situations," says Devine, "and we felt, based on the focus groups, that seven different scenarios would provide people with enough choices. We first asked them to pick a scenario that made sense to them, and there would be a variety of

"We could no longer assume we understood what customers needed and wanted and, as time went on, what were new, emerging needs and expectations. In order to do that, you have to go out and talk to customers, and a customer satisfaction tracking program clearly is the most effective way of doing so."

Michael English

things related to that particular choice. The attributes that were important to people in our focus groups were then given to them on full profile conjoint cards, so they were given the attributes relative to that particular choice and what they were doing is trading off how much service they required for each of those attributes.

"For example, if it were timeliness, we would give them different choices in terms of how quickly they needed service if they were having something new installed, ranging from immediate service to within



BCOS calls are made from Total Research's Taropa, Fla. telephone facility

the next week, to within the next 30 days."

"We wanted to know what they would trade off, given the situation," English says. "In several cases what they needed was very price inelastic. Price was as important as what they needed had to be reliably provided, done right, and on time

Data transmission quality

The qualitative and quantitative Business Customer Expectation Study identified data transmission quality as an at-

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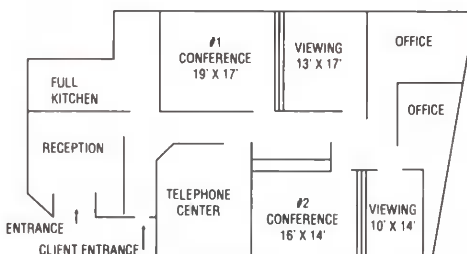


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tribute of major importance to the customers, especially medium and large customers.

"We knew it was important," English says, "but we didn't understand it to be as important as it was shown to be in the research."

It was especially important for businesses such as banks that rely heavily on telephone data transmission to transfer information, for example, from branch offices to the main office. In fact, in areas susceptible to circuit-breaking lightning strikes and power surges, some customers would use two or three lines as backups because they didn't trust their primary circuits to be reliable.

GTE took this information regarding reliability needs to its network operations planners and engineers, who translated the insight into revised engineering and construction specifications. Many of the service people found that the customers had requested a voice grade circuit, when what they needed was a data grade circuit, which was better designed to deliver reliable transmission quality and protection against power surges.

"We discovered that we were going to have to do a better job of communicating with our customers to understand what their needs are so we could better design a solution and, specifically, to give them the data transmission quality that they need," English says.

"One thing we've learned is that customers speak one language and we speak

sometimes within our industry another language. Part of what we're doing is trying to translate customer language into language within GTE we understand and can act on."

The strengthened communication with customers, along with technical improvements-through overnight line testing and other efforts-led to an increase in the number of customers satisfied with data transmission quality.

Sales force

The focus groups and overall research also gave GTE valuable information on how their customers perceived the GTE sales force. Too often, the research showed, the customers felt that the GTE sales people didn't understand enough about their industry, whether it was banking, insurance, education, or government, and that made it difficult, English says "to translate the unique characteristics and needs of their industry into telecommunications solutions."

"So, with the key involvement of our marketing people, we put in place through BCOS a series of questions that had to do with how often the customers were being contacted by the sales force, how knowledgeable the sales force was about products and services related to their needs, how timely the sales force was in responding to their problems, and how satisfied they were with things that the sales force had proposed, subsequently were agreed to and contracted for."

Once again, the research led to an increase in customer satisfaction. Approval has jumped 20% over the two years since

tracking began.

Action Comment

In addition to uncovering more pervasive problems through the BCOS questionnaire, there is a facet of BCOS used by about 1,000 respondents per year called the Action Comment Procedure which lets GTE be responsive to individual complaints. During the BCOS interview, if the customer indicates a need or a problem that's not being met, the interviewer can step into the ACP.

"The ACP is a separately prepared document, written up by the interviewer, that in effect says the customer wants to be contacted by GTE about this matter," English says. "It could be something as simple as they have not received their telephone directory, or it could be something more complex, like they have a service problem and could someone from GTE come out and talk about it."

The Action Comment Procedure, through customer requests for upgrades and service changes, has also generated sales leads, says English. "As you categorize these action comments, some fall into the category sales leads. So here is a case where a program has actually generated sales leads for growth of new revenue.

"There has always been out of this program the identification of specific types of problems plaguing customers, say it was the delivery of directories in one location, for example. Those have been identified in a better way and acted upon. This year we may find something new that's important to them that they want handled differently, and that will enable us to better respond to what they need."

Other programs

Information gleaned from BCOS has led to other ongoing programs. For example, in Tampa, Florida, GTE now holds regular business customer forums, where they get together with customers over lunch to discuss an agenda of topics set by the customers. In addition to keeping them in touch with their clients' needs, the meetings let GTE keep their clients in touch with what GTE is doing to improve service and directly address their needs.

In California, a consumer advisory panel, made up of people from fields such as business, government and education,

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Long term

These and other facets of the research help GTE address immediate customer problems and concerns, resulting in immediate benefits. But the research may be most beneficial in the long term, where GTE is able to bring the following four objectives to bear, using the data as:

1. a basis for strategic planning, something to give them an indication of what areas they should focus on in the development of new programs, new products and new services.

2. a basis for performance measurement, to compare how well each of the GTE operating units around the country was doing in comparison to the others, and how they compared to the overall GTE average.



3. a primary source of customer information. "If we had specific things we wanted to know," English says, "we could add on questions for certain types of customers as a primary source of information to meet other needs without having to separately have that customer re-interviewed."

4. a springboard for additional intelligence gathering, to find out, for example, how well their customers rated GTE in comparison to their competitors.

Another important long term use for the research data has been the tracking of GTE's advertising, especially in those markets which the company has been engaged in correcting years of negative feelings towards the local telephone service, which, prior to purchase by GTE, had failed to adequately respond to customer needs.

"We've learned that some of our companies have what we call a positive and negative halo," English says. "We've taken the findings and conclusions and integrated them into the planning for advertising to better approach the image we're leaving with our customers, about how much we care about them.

"It may be that we've not seen all the benefits or dividends from the things that are going on in this area, because with strategic planning you're talking long-term. But there are things in the works now and I'm optimistic we will over the next few years have delivered much better on those things of greatest importance to customers." MRR

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Trade Talk

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To ensure a representation of office workers from different occupational levels, quotas were established to recruit approximately one-third of the respondents from each of the following categories: top/mid-management; junior management, and secretarial/clerical.

The interview itself sought detailed information on usual behavior and specific activities in the previous week: the time at lunch, sources of meals and spending; shopping during the work day, items purchased and amounts spent; commuting patterns, shopping and other activities after work.

General findings

On average, office workers in downtowns with ample retail facilities spend \$2,085 a year, about one-third more than their counterparts in downtowns with limited retail facilities. The differences are evident in every major category but are particularly pronounced in spending after work. The amounts are relatively small but office workers in strong retailing downtowns spend about twice as much after work on dinner, drinks and shopping as those in downtowns with limited retail facilities. In suburban areas near major regional malls, office workers spend an average of \$2,055 per year, about 15% more than their suburban counterparts with limited retail facilities. The differences are most pronounced in work day retail spending and in dinner or drinks after work.

Overall, food accounts for roughly half of total office worker expenditures: lunches, snack purchases during the work day, and dinner or drinks after work. Such food items account for 48% of total spending in suburban areas near major regional malls and range up to 59% of the total in downtowns with limited retail facilities.

Lunchtime behavior

While there are many differences between downtown and suburban workers in the various retail settings, there are also several important common denominations in lunchtime behavior.

Lunchtime activity is concentrated within a relatively short time span: 70% of all office workers leave for lunch sometime between noon and 1:30 p.m. They are away from their desks an average of 51 minutes. Almost half (49%) take a full hour for lunch and just under 40% take less time. On average, downtown workers take somewhat longer lunch hours than their suburban counterparts (a mean of 54 minutes compared to a mean of 48 minutes).

Three-fourths of the office workers reach their lunch destination in less than 10 minutes. Eighty percent of the downtown workers usually walk to lunch and 85% of the suburban workers usually drive.

Bringing lunch from home is the single most important source of lunchtime meals: 31% of the lunches eaten in the previous week were brought from home. The majority of respondents never brought their lunch from home but 45% did so at least once and just over 10% brought it every day.

Other sources of lunch during the week were sit-down restaurants (22%), carry-outs (15%), fast food restaurants (15%) and company cafeterias (6%). On any given day, 7% of the office workers didn't eat lunch.

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During the work week covered in the interviews, office workers ate the majority of their lunches in the building where they work. One-fourth ate in the building every day. Reflecting winter behavior, these patterns may be different in warmer weather.

Work day shopping

Overall, 38% of the office workers reported shopping during the work day. The patterns, however, differed greatly between downtown and suburban locations, and between areas with ample retail facilities and those with more limited shopping opportunities.

In downtowns with ample shopping facilities - Boston, Chicago, Denver, San Francisco and Seattle - 45% of the office workers shopped during the work day. In downtowns with more limited shopping opportunities - Atlanta, Tampa, Dallas and Oakland - on the other hand, only 35% of the respondents shopped during the work day.

In suburban areas, the availability of retail facilities also had an effect: 38% of the suburban office workers near a major regional mall shopped during the work day compared to 32% of the workers with more limited retail facilities nearby.

While the proportion of office workers shopping during the work day varied by area, the average number of shopping trips did not differ very much, approximately 2.5 times during the week.

In one of the big surprises of the study, only 60% of the work day shopping trips occurred during the lunch hour; 40% occurred at other times during the work day.

There are several possible explanations for this. Men, and those of both sexes in upper management positions, frequently have the flexibility to go shopping during normal work hours. In the survey, in fact, the incidence of non-lunch shopping trips was higher among these groups than it was among women as a whole and those in the lower rungs of the management structure. Then, too, some office workers may eat lunch quickly at their desks and go out to shop at other times during the work day. In any event, the high proportion of non-lunch shopping trips reported in the survey contradicts the conventional wisdom that office worker retail spending is confined to the lunch hour.

Apparel and accessories

Apparel and accessories were the items most frequently purchased during the work day shopping excursions. Nearly 20% of the downtown workers and just under 15% of the suburban workers reported purchases in these merchandise lines. Roughly 10% of the respondents in both types of areas reported buying other shoppers goods (or department store-type merchandise), and 10% bought incidental items such as books, magazines, greeting cards and drug store items. Suburban workers bought groceries and other food stuffs during the work day more often than their downtown counterparts.

Activities after work

Office workers do a wide variety of things after work before they go home. During the week surveyed, 53% bought groceries; 30% had gone shopping for other things; 29% stopped for dinner or drinks; and 30% stopped for other activities such as a visit to a health club, an exercise class, movie or educational program. Only one-fourth of the respondents went directly home every night after work.

While office workers do a lot of things after work, the majority do them at locations closer to home. Only 12% of the respondents stopped for dinner or drinks at places close to the office and a smaller proportion went shopping near their place of work. In both downtowns and suburban areas with ample retail facilities, however, these proportions were higher than they were in areas with more limited retail facilities.

ISCS commissioned Floam Research Associates to direct the survey and data tabulations. Sampling lists were provided by American Business Lists, Inc., and the interviewing was conducted by AHF Marketing Research, Inc. MRR

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By Beth E. Hoffman



Survey investigates office worker retail spending

The average office worker spends about \$1,900 a year on lunches, day time and after-work shopping and dinners and drinks, according to a survey conducted last year among suburban and downtown office workers.

The survey by New York-based International Council of Shopping Centers covered 2,400 workers in eight metropolitan markets across the U.S. ICSC serves as the trade association of the shopping center industry. John Chapman, the council's director of research, presented the survey in Minneapolis to a group of Twin City retailers and retail developers.

"With the continued interest in downtown retail development and mixed use projects and with the evolution of suburban 'downtowns' with regional malls at their core, office workers are an increasingly important source of retail spending," says

Chapman. "In the past, there has been some fragmentary research on their spending behavior in specific markets but no systematic benchmarks on things such as how much they spend, on what and why."

The council hopes that the survey's findings will prove useful in evaluating the feasibility of retail projects in which office workers play a role, and in developing marketing programs to attract the office worker customer.

Downtown and suburban areas

The survey included both downtown and suburban areas. On the assumption that spending behavior is influenced by the availability of retail facilities, both downtown and suburban markets were classified by retail service level: those with ample retail facilities and those with limited retail facilities. Examples of cities with ample retail facilities are Boston, Chicago and San Francisco; cities with limited shopping are Atlanta, Tampa and Dallas.

Downtowns were classified on the basis of data from the 1982 Census of Retail Trade. In suburban areas, offices within two miles of a major regional mall were considered to have ample retail facilities.

Telephone interviews

Conducted by telephone in November, 1987, with office workers at their place of work, the interviews sought detailed information on their lunchtime activities, spending patterns, and shopping habits during the work day and after work.

The eight metropolitan areas in which interviews were conducted are among the 30 largest in the U.S. and were selected to provide broad geographic diversity. In each metropolitan area selected, the local office of a national real estate consulting firm drew upon its knowledge of the local market to identify specific office sub-markets reflecting a broad range of settings. In total, nine downtowns and 16 suburban office areas with at least one million square feet of office space were selected for the interviewing.

Once telephone contact with a business was made, the interviewer asked to speak with someone at a specified occupational level. Respondents were screened to ensure that they were employed full-time (at least 35 hours/week) in the designated sub-area, worked in an office facility and worked during the previous week.

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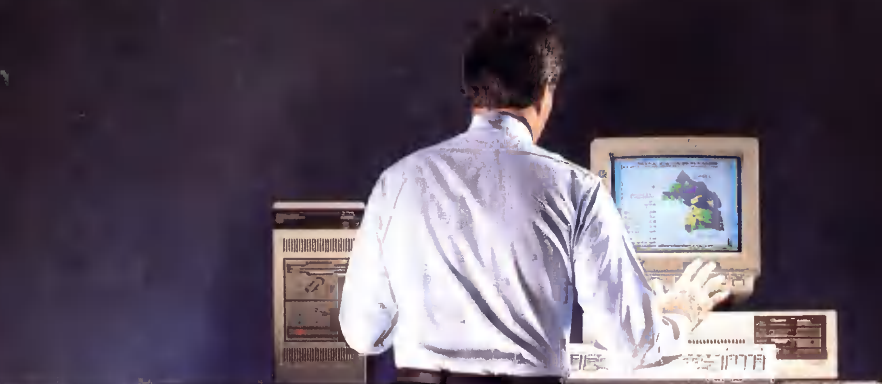
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The desktop system that puts you on top of your mainframe marketing data.



Sales Territories

Customer Names & Addresses

Customer Balance
Billings, Transactions

Mapping Boundaries

Branches/Stores/Agents

Census Demographics

Five-Year Projections

Annual Updates

Tracts, BG/EDs

PRIZM/Update™

Local Media Data
Wealth Base™

Business Data

RL Polk Counts

SMRB/MRI Database

PRIZM Interlock

Daytime Population

Age x Income Tabs

P\$YCLE Segments

Your markets are changing. So you need to look at your customers in new ways.

Your company's mainframe contains a wealth of customer information. But how do you get your hands on it, easily and flexibly?

Customer Information On Your Desk.

Now there's Compass. The desktop marketing system that puts you on top of your mainframe customer data.

Compass handles detailed customer data: names, addresses, transactions, distribution points — all the information you need, right on your desk.

Plus, Compass gives you a comprehensive data library: demographics, mapping boundaries, and syndicated product data.

Tailored To Your Needs.

Of course, we wouldn't give you this much data without some powerful tools to analyze it.

Compass features Pathways,™ software "shortcuts" through the data. Our applications engineers will create custom Pathways for your industry. And you can use Pathways to store your own favorite Compass applications. Either way, you get a system tailored to your needs.

To learn more about the Compass system, call **1-800-368-2063**. Or mail the coupon.

Compass from

CLARITAS

The Target Marketing Company

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Tell me more about the Compass desktop marketing system.

Name _____

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Firm _____

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