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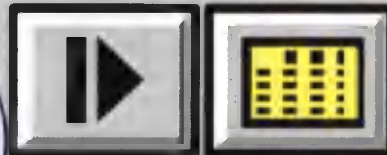
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Volume IX, Number 8

October 1995

Cover
In-bound surveys helped Long John Silver's tap the thoughts of its carry-out and drive-through customers. Photo courtesy of Long John Silver's.

FEATURES

- 10 Form reform**
Machine-readable surveys make it easier for utility's customers to express their satisfaction
- 12 Don't call us, we'll call you**
Long John Silver's uses in-bound surveys to get reactions from a key customer segment
- 16 War stories: True life tales in market research**
- 18 Improving reception**
Cable companies must listen to customers if they hope to survive in a rapidly changing market
- 22 Let your fingers do the talking**
In-bound telephone surveys invite respondents to express their satisfaction digitally
- 24 Raising customer satisfaction through expert system analysis**
- 26 Reengineering the marketing research function**
The information management department in the year 2900

DEPARTMENTS

- | | |
|----------------------------|---|
| 6 Survey Monitor | 50 Focus Group Moderator Directory |
| 0 Product & Service Update | 65 1995 Customer Satisfaction directory |
| 14 Data Use | 80 Classified Ads/Listing Additions |
| 20 Names of Note | 81 Index of Advertisers/Letters |
| 21 Research Company News | 82 Trade Talk |

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Survey Monitor

Fast-food fans favor burgers

Over half (53 percent) of Americans who eat at fast-food restaurants make three to ten trips each month, according to a new

Maritz AmeriPoll survey by Maritz Marketing Research Inc., Fenton, Mo. A few (15 percent) are



fast-food junkies visiting 11 or more times a month. Only one-third (32 percent) limit their visits to once or twice per month.

A majority of fast-food customers (70 percent) say they most often visit burger restaurants. The next largest group (8 percent) prefer to eat at Mexican-style establishments. Pizza and chicken restaurants tie for third, each attracting 6 percent of fast-food fans most often.

Men and women differ slightly in their tastes for fast-food. While men most often prefer burger restaurants (76 percent of men to 65 percent of women) women are twice as likely to go to chicken restaurants most often (8 percent of women to 4 percent of men).

Lunch is the most popular meal among fast-food fans.

More than half (57 percent) are most likely to visit a fast-food restaurant for lunch while less than one third (30 percent) go for dinner. On average, only 8 percent go most often for breakfast. Fast-food breakfasts are more popular among older people, however. Fourteen percent of those age 55 and over select breakfast as the meal they most often eat at a fast-food restaurant.

Most fast-food eaters weigh two factors more heavily than others when they decide where to eat: convenient location and food quality. Twenty-six and 25 percent, respectively, say

these factors influence their restaurant choice most. Menu selection is a surprising third (16 percent), and only 8 percent of respondents cite reasonable prices as the most influential factor in choosing a restaurant. For more information, call Kristi Pearce at 314-827-1610.

Teens would rather watch TV than go on-line

According to a recent survey by Chilton Research, Radnor, Pa., nearly half of America's teens (11-18 year olds) say they use a computer at home

and more than one in five log onto an on-line service or bulletin board through their home computer. For teens, playing video games is the main attraction of on-line services, more popular than chatting on-line. In general, teens are much more savvy about high tech products than the general population. Half (51 percent) have used a CD-ROM player (most likely at school) and 6 percent have bought a CD-ROM title in the past month.

Despite their penchant for newer high tech products, they still adore the pure entertainment of watching TV; twice as many of those teens who have used on-line services say watching TV is more fun than going on-line. For their TV fare, teens prefer sitcoms over other types of

Air bags are most important accessory

Nearly one in five (18 percent) Americans say they plan to buy a new car in the next year, according to an OmniTel survey of 1,000 adults by Bruskin/Goldring Research, Edison, N.J. Features Americans say are most important in a new car are air bags (29 percent), air conditioners (21 percent), a sound system (17 percent), and an anti-lock brake system (16 percent). While more women (31 percent) than men (27 percent) say air bags are one of their most important new car features, men are more likely than women to look for air conditioning (24 percent), a sound system (19 percent) and anti-lock brakes (17 percent).

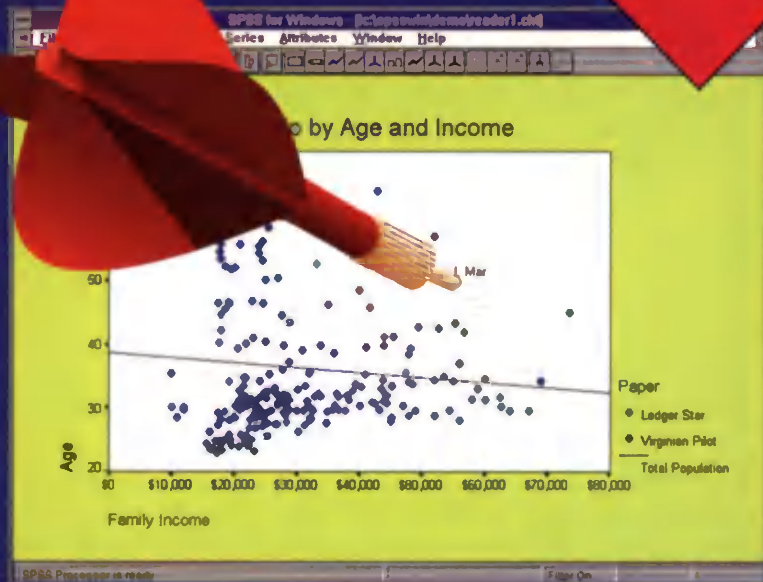
One in three respondents say air bags are an important feature, but other safety features get less attention. For example, child-proof door and window locks were cited by only 3 percent of respondents, and 2 percent named the passive/automatic seat belt system. Built-in child seats, high-strength door latches, and crumple zones were named by even fewer respondents.

The prospects most likely to sign on the dotted line are men (22 percent, compared to 14 percent of women), those aged 18-24 (40 percent) and residents of the Northeast and the South (both 20 percent). For more information, call 908-572-7300.

continued on p. 28

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Product & Service Update

Free information on how to conduct research

Financial Product Architects, Inc., Manchester, Conn., recently participated in the National Association of Independent Insurers Executive Marketing Seminar. A copy of the company's presentation, "The ten most important things you need to know about market research," is available free. Call Mark Trencher at 203-647-4880; fax 203-647-4820. Software maker SPSS, Chicago, is also offering a free booklet, *SPSS Survey Tips*, designed to help readers design, conduct and analyze surveys. For a free copy, call 800-543-9252.

City by city sports data available from NSGA

The National Sporting Goods Asso-

ciation has made available "Sports Participation in 1994: City-by-City," which projects sports participation for the total U.S. population as well as the 47 largest metropolitan statistical areas. The report covers sports with at least eight million participants in 1994, including aerobic exercising, baseball, bowling, calisthenics, camping, softball and others. The 26 sports are indexed for each city. The data is based in a sampling of 20,000 U.S. households. For more information, call 708-439-4000, ext. 224.

Equifax launches new program for value added resellers

Equifax National Decision Systems, Atlanta, has launched a new program called Market Partners designed specifically for value added resellers. The

program offers software developers, marketing consultants, strategic and business planning firms, direct mail list providers, magazine distributors and other businesses an opportunity to add value to their products or services through the use of National Decision Systems' geodemographic, market segmentation, site selection and other analytical applications. For more information, call 800-866-6520.

Claritas debuts two new products

Claritas Inc., Arlington, Va., has released its 1995 UPDATE, which draws on information from more than 1,600 data sources, including the latest information from the U.S. Census Bureau, to provide neighborhood-level (census

continued on p. 47



IRI TEST MARKETING SEMINARS

Information Resources, Inc.'s IRI University kicks off its second annual test marketing seminar series in Chicago, New York and San Francisco. The basic seminar is designed for brand and market research managers with an emphasis on new product introductions and test marketing. Participants examine a variety of testing methods including advertising weight tests, pricing studies, brand repositioning and package shelf study tests. The all-day format provides a comprehensive discussion of theoretical issues and offers practical examples of how to select and design the right test. Basic seminar dates and locations are October 27, 1995, Sutton Place Hotel, Chicago; November 16, 1995, The New York Helmsley Hotel, New York; January 25, 1996, Stanford Court Hotel, San Francisco. The advanced seminar is for the experienced test marketer, delving into the nuts and bolts of matching techniques, covariance analysis, complex test design and new product forecasting applications. The advanced seminar date and

location is November 17, 1995, The New York Helmsley Hotel, New York. For more information, call Shirley Hinojosa at 312-474-8877.

CALL FOR ENTRIES FOR OILVY AWARD

October 31, 1995 is the closing date for entries for the 1996 ARF David Ogilvy Research Awards. Seven awards are given: three for the best examples of research contributions throughout the process of developing measurable successful advertising campaigns, and one each for the best examples of research contributions to strategy development, development of an execution, pretesting, and guiding media exposure. Researchers from advertisers, agencies, media and research companies are invited to enter. Entrants must present case history descriptions summarizing the campaign backgrounds, the types of studies conducted, how the research was integrated into the process and the impact of major findings on the campaign or some aspect of its development. The emphasis is on research that makes a difference. The research need not be innovative or a technical breakthrough but it

continued on p. 46



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Form reform



After NSP centralized its phone center operations, customers were having a hard time getting through. "The research helped us learn how many call attempts customers would tolerate and how much time they would spend on hold. With those targets, our phone center staff was increased to meet those targets and the research has shown increases in customer satisfaction," says NSP's Mike Peppin.

Customer satisfaction

Machine-readable surveys make it easier for utility's customers to express their satisfaction

By Joseph Rydholm, QMRR editor

Computer-readable survey forms no longer have to resemble the multiple choice tests that haunt schoolchildren's dreams. The advent of sophisticated software that can read handwritten marks, numbers and letters now allows researchers to send out forms that are much less daunting to the respondent.

They don't need to look like the forms of old, with their rows of ovals that required precise filling in with a No. 2 pencil. Instead of blackening the dots, respondents can answer with an X or a check mark. And a pen will do just fine, thank you. Gone are the numerous hash marks in the margins that guided the machine's eye over the form. Now only a few marks are necessary, freeing form designers to increase type size and use colors to help respondents follow skip patterns.

Three years ago, seeking to make its surveys easy for respondents to complete, Northern States Power Co. (NSP) switched to machine-readable image/OCR (optical character recognition) forms for its ongoing customer satisfaction mail research. Minneapolis-based NSP provides electricity to 1.4 million customers in five midwestern states and natural gas to 400,000 customers in four states, covering a service area of approximately 49,000 square miles.

The quick turnaround time in processing the forms also helps the NSP research department better serve its internal customers, says Mike Peppin, supervisor, market research, NSP. "It's critical that we get the results out to our internal customers quickly because they have satisfaction goals that they have to meet."

For help with designing its machine-readable surveys, NSP turned to Data Recognition Corp. (DRC), a Minnetonka, Minn., firm that provides custom survey

processing services. DRC also maintains the master customer database for NSP and mails and processes the surveys, using high-tech, image/OCR scanning technology.

"NSP wanted a survey form that was user-friendly looking," says Wayne Serie, vice president of DRC. "They didn't want their customers to feel like they were completing a test. We designed a form that allows the customer to concentrate on thinking about NSP's service, not how ugly the form is."

NSP provides DRC daily and weekly samples of customers who have recently had contact with NSP representatives. Customers are mailed a four-page document (a one-page cover letter and a three-page survey). If a customer has received a survey from NSP in the past year they aren't sent another one, to avoid bothering them unnecessarily.

Respondents are asked to rate NSP's performance and describe their interaction with its representatives. They

Instead of blackening the dots, respondents can answer with an X or a check mark. And a pen will do just fine, thank you.

continued on p. 56



Satisfaction with tree trimming service is another area NSP's research examined. By pre-inspecting customers' trimming requests, NSP was able to make better use of busy crews' time and meet customer expectations.

Don't call us,



Customer satisfaction

Long John Silver's uses in-bound surveys to get reactions from a key customer segment

By Joseph Rydholm, QMRR editor

Conventional wisdom says that most consumers don't want to be bothered to participate in a research study. Well, that notion is being challenged by an increasingly popular technique in which the respondents are the ones who call the researcher.

In this case, the "researcher" happens to be a machine, a sophisticated software program that lets respondents use their touch-tone telephones to take an "in-bound" survey. Their impersonal nature, and the fact that the respondent controls when the interview is conducted, may be part of the reason in-bound surveys earn better than average response rates for some users.

One firm that has successfully used in-bound surveys is Long John Silver's Restaurants, a quick-service seafood chain based in Lexington, Ky., with nearly 1,500 locations in 38 states, Canada, Singapore and Saudi Arabia. Long John

we'll call you

Silver's uses Show N Tel, an in-bound survey program made by Interactive Communications Inc., Dallas, that runs on an interactive voice response system. (For more information on in-bound surveys, see page 22.)

As part of its regular research, the company last year used the in-bound surveys to reach an elusive customer segment — drive-through and carry-out patrons. "A big part of our business is drive-through and carry-out customers," says Larry Noble, marketing research manager, Long John Silver's Restau-

"The main advantage [of the in-bound approach] was that it helped us get in touch with a customer segment that we hadn't been able to reach before as effectively. When the need comes up to talk to those people again we will use it because it worked well for us."

rants. "While it's easy enough to talk to our dine-in customers it can be difficult to get drive-through and carry-out customers. [The in-bound survey] has worked the best for us in reaching these people. Up until we did the surveys, we didn't have a lot of information on those



Survey invitations were handed out to Long John Silver's carry-out and drive-through customers, who received a free meal and beverage for completing a brief in-bound phone survey.

customers. We've tried mail-in surveys but the return rate is historically low."

Cards were distributed to Long John Silver's carry-out and drive-through customers inviting them to call a toll-free number by midnight to participate in a short survey. In exchange they would be given a code at the end of the interview which validated the card as a coupon they could redeem for a free meal and beverage of their choice.

When the respondents called in, they were greeted by the system: "Hello and thank you for calling the Long John Silver's Survey Line. We're interested in your opinions regarding your recent visit to our restaurant." Once it was established that the caller was using a touch-tone phone, he or she was told how long the survey would take and

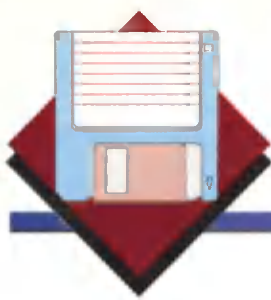
how to receive their incentive.

While Noble won't elaborate on how the results were used, he says that the information gleaned from the surveys was valuable. "The main advantage [of the in-bound approach] was that it helped us get in touch with a customer segment that we hadn't been able to reach before as effectively. When the need comes up to talk to those people again we will use it because it worked well for us."

Immediate responses

Mark Mulch, national project director, Interactive Communications Inc., says that one of the benefits of the in-bound approach is the immediacy of the responses. For example, instead of

continued on p. 57



Data Use

Regression analysis is a key to actionable results in CSM

By Patrick McPhillips and Eleonora Malpa

Editor's note: Patrick McPhillips is research manager, and Eleonora Malpa is marketing coordinator, with FIND! SVP, New York.

The main objective of any customer satisfaction survey is to isolate key areas for improvement. But just how does a company know which of the targeted areas will bring the greatest value to the customer and, thus prove a

worthwhile investment of time and resources?

There are several analyses commonly applied to the data resulting from quantitative customer surveys. The first set of analyses ranks the importance of supplier selection criteria. The second set gauges customers' perceptions of a company's performance and provides an assessment of competitors' performance. Often the analysis process stops here, overlooking a vital component: the regression analysis.

Regression analysis can pinpoint the areas that have the greatest impact on customer satisfaction. It is effective in illustrating the impact on performance one product or service issue (independent variable) has on overall customer satisfaction (dependent variable) with the company. This helps companies identify what to concentrate their resources on to maintain profitability and ensure long-term success.

While it is rather simple to gather the necessary data and information from current and prospective customers through telephone or other surveys, analyzing the data appropriately is not. In a typical customer satisfaction survey, respondents are asked to rate the importance of several supplier selection criteria using a scale of anywhere from four to 10 points. These criteria have been determined ahead of time through an exploratory or qualitative phase where in-person or in-depth interviews are conducted with industry experts. The idea is to include as many important selection criteria in the survey as possible, keeping in mind that the interview will last between 15 and 18 minutes.

There are two common ways of determining the importance of supplier selection criteria in customer satisfaction surveys: calculating the mean rating and calculating the Top 2 Box scores based on a frequency distribution. Both provide simple numerical rankings. For these approaches, the t-test is an effective statistical tool which helps determine if there are statistically significant differences between the importance of two given issues. In

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other words the t-test can help qualify the numerical ranking provided by the mean and frequency distribution.

The simplest way of determining the importance of the various issues is to calculate the mean rating given by the respondents for each issue. If the scale used is as follows,

Sample Scale

Critical	4
Very Important	3
Important	2
Somewhat Important	1
(Not Important)	0

(There should not be any issues that are not important, although you can allow for the rare respondent who insists that a particular item has no importance to him/her.)

then the resulting ranking might look like the following (in decreasing order of importance):

Fictitious Data

Product quality	3.74
On-time delivery	3.68
Price competitiveness	3.65
Conformance to specifications	3.42
etc.	etc.

The t-test is then used to determine whether the difference between the means of two issues is statistically significant. Based on the above fictitious data, a t-test

could tell us that the importance rating received by product quality (3.74) is greater than the importance of price competitiveness (3.65) but not more important than on-time delivery (3.68). In this example, the t-test shows that even though product quality appears to be more important than on-time delivery, statistically, it is not.

Another method used to calculate importance is to look at the Top 2 Box scores for each supplier selection criterion. This approach requires calculating the frequency distributions for each criterion. A frequency distribution simply shows what percentage of the respondents rated a particular issue as being critical, very important, important or somewhat important. The result would look something like this:

Fictitious Data

	% Critical	% Very Important	Top 2 Box = Critical + % Very Important	% Important	% Somewhat Important	% Not Important
Product quality	58	27	85	10	5	0
Price competitiveness	46	28	74	18	6	2
On-time delivery	52	20	72	7	20	1
etc.						

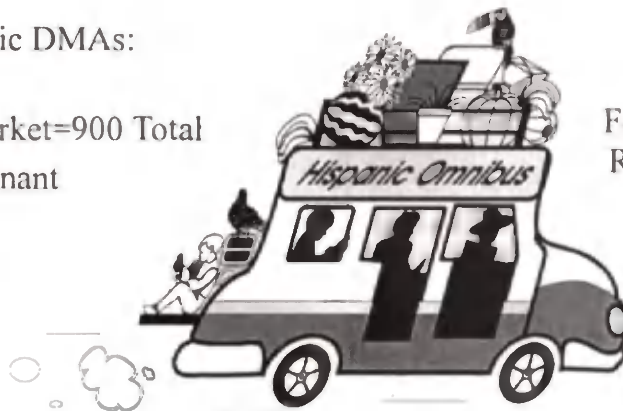
The criteria are ranked in decreasing order of importance according to their Top 2 Box scores. Again the t-test is applied to determine whether or not the difference between issues in the Top 2 Box is statistically significant. Some feel that this approach is more valid than simply taking the mean.

continued on p. 42

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War stories:

True life tales in marketing research

By Art Shulman

Editor's note: "War stories" is a regular feature in which Art Shulman, president of Shulman Research, Van Nuys, Calif., presents humorous stories of life in the research trenches. Readers are invited to call or write Shulman with stories of their own.

During the course of my work, clients describe me in different ways — although none has resorted to the colorful language used by my ex-wife. When they refer to me as a "vendor," I imagine myself selling peanuts at ball games or collecting coins from candy machines. Others call me a "supplier," which brings to mind disturbing visions of drug deals or selling overalls to factories. Personally, I just love being called a "bean counter."

Recently we completed a study on travel, where we had the pleasure of counting lots of beans. For example, when we asked people where they vacationed, we spoke with lima beans (visited Peru), baked beans (Palm Springs), refried beans (Palm Beach), green beans (Ireland), chili beans (where else but Chile), and jumping beans (Mexico).

Not everyone pays attention to every word we market researchers say. Michelle Zwillinger tells of a focus group where she advised the female participants that there were people behind the one-way mirror. About 20 minutes later Zwillinger offered the participants the opportunity to try a new product designed for their feet. One woman, anxious to try it, began to take off her panty hose, in full view of the male clients behind the mirror.

That woman didn't remember that there were people behind the mirror. On the other hand, Zwillinger also remembers a group in which the woman to her left was very proud of her "new body," a result of her having lost a lot of weight. The woman intentionally, according to Zwillinger, let her minidress ride up over her thighs, and opened her blouse, knowing full well, as Zwillinger had explained, that there was a group of clients behind the mirror.

On the other hand, it's not only respondents who have problems with clothing. Joe Koerner of The Qualis Company recalls the time, early in his career with a St. Louis research company, when he was scheduled to present the results of focus sessions to a large New York advertising agency. Koerner was

escorted to a meeting room and nervously lined up his charts and the overhead. Just before the agency account team came into the room he decided to check his appearance. He determined that his tie was straight, his shirt tucked in and the vest buttons on his new three-piece suit were perfect. And, just as the agency folks walked in, that his fly was open!

Imagine how Donna Tinari-Sigfried of Fundamental Research Group felt when, while moderating a focus group on a new product being tested as a promotion by her telecommunications company client, a respondent said, "I love this new promotion. My dad sent me a whole bunch."

"Your dad sent you these?" Sigfried asked, somewhat panicked, as a large contingent of agency and client personnel observed through the mirror.

"Oh, he works in advertising for [the client company]," explained the consumer.

From then on, Sigfried vowed to use the screening question, "Does anyone in your family or any of your friends work in...?" rather than asking just about household members.

Mike Halberstam of Interviewing Services of America reports that an elderly female respondent contacted in one of their telephone surveys asked how she was selected to be called. The interviewer advised her that her number came out of a computer. The indignant woman complained, "That's ridiculous! I have never, ever put my number into any computer!"

Kathleen L. DeWitt of KLD Marketing Research reports that while screening for respondents on a study involving baking products, she came across an elderly woman who was offended by DeWitt asking to speak with the "senile head of the household."

Once DeWitt assured her she was looking for the "female" head of household, the interview continued, with DeWitt asking, "When was the last time you had brownies in your home?" Her response: "Honey, we live in the woods. They don't come around here."

So much for senility, DeWitt concluded.

In future installments of this column, we'll report on more quirky, loopy and strange happenings in the world of market research. Whether you're a research provider or a client, if you'd like your story to be told please call me (818-782-4252) or, better yet, write it up and fax it to me (818-782-3014).

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Improving

reception

Cable companies must listen to customers if they hope to survive in a rapidly changing market

By Richard Schreuer, Polly Staman and Jim Higgins

Editor's note: Richard Schreuer is senior vice president, and Polly Staman is project manager, with Chadwick Martin Bailey, Inc., a Boston, Mass., research firm. Jim Higgins is vice president cable marketing, Greater Media Inc., an East Brunswick, N.J., cable company.

For years now, the cable industry has been bracing for competition as new technologies create alternative means for signal delivery, while potentially offering greater channel selection and improved picture and sound clarity. No longer an abstraction, competition has arrived in many systems across the U.S., often in multiple forms. Cable companies, many operating with a "utility mentality," (i.e. "We're the only game in town") must adopt more proactive and dynamic strategies to compete successfully in this increasingly crowded market.

The extent of the threat to an individual system varies according to the presence of competing technologies and the loyalty of the system's sub-

scribers. But regardless of whether the threat is massive and immediate, or moderate and long-term, all systems are vulnerable to erosion of their market share. The companies that thrive will be those that change from a complacent mindset to an entrepreneurial one, making the strategic, managerial and organizational changes that are called for in this market environment.

Companies that make this transition may well emerge stronger than before. By necessity, they will increase customer loyalty by providing top-notch customer service, fostering relationships with their subscribers and offering new products. In short, they will become more customer focused, nimble and innovative.

Information is a critical factor in making this transition to a competitive mindset. Cable systems that haven't yet internalized the reality of the competitive threat need to be jolted by realistic projections of market share and revenue loss. Systems that

Cable providers no longer have the luxury of taking a trial and error approach to marketing. Before launching new products, service guarantees or other innovative offerings, system managers must understand their impact on loyalty, market share and revenue. And this information is needed now.

already recognize the threat need information to assess the effectiveness of specific offensive and defensive strategies.

Cable providers no longer have the luxury of taking a trial and error

continued on p. 36



Just because it has ten digits doesn't mean it's a phone number.

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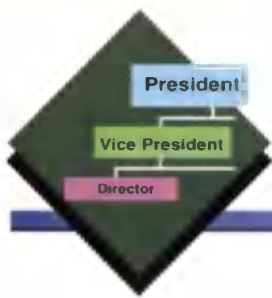


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Names of Note

Richard C. Steinberg has joined *Blockbuster Entertainment*, Ft. Lauderdale, Fla., as corporate director of marketing research.

Nancy Low & Associates, Inc., Chevy Chase, Md., has added several new people. Joining the firm are: **Sharon Rizzo** as marketing manager; **Cathryn Seymour Dorsey** as senior project manager; **Nancy Klein** as senior research manager; **Amy Hansen** as writer and illustrations researcher; **Jennifer Zentmyer** as research analyst; **Ned Buffon** as research analyst; **Sharon Simmons** as office manager; and **Michael Sandler** as staff accountant. In addition the new hires, the following staffers have been promoted: **Susan Lopez Mele**, to creative director; **Amy Rakowski**, to marketing associate; **Heather Manning** to associate.

Gregory J. McMahon will head the new Morristown, N.J., office of *Market Facts* as senior vice president.

Eulee Motz has been promoted to senior project director at *TeleFocus*, a unit of New York-based *TeleSession Corp.*

Kathy Wurth has been named director of marketing research at *Blattner! Brunner Inc.*, a Pittsburgh advertising, marketing and public relations firm.

Chris Job has joined *NETWORK*, a company representing operator-owned data collection companies, Covington, Ky., as technology information specialist. In addition, **Linda Tessar**, president and CEO of *NETWORK*, has been installed as president elect of the *Marketing Research Association*.

Promark Research, Inc., San Antonio, Texas, has added **Rene R. Segoviano** to its staff as an assistant project director.



Segoviano

Nye

W. Steven Nye has been named general manager of the San Diego office of *Equifax National Decision Systems*.

Healthcare Communications, Inc., Princeton, N.J., has made two management changes: **Mahesh Naithani** has



Naithani

Paul

moved from president to chairman; **C. Marshall Paul** has moved from executive vice president to president.

Chris Klitus has been promoted to treasurer and office of *Response Analysis Corp.*, Princeton, N.J.

Kathleen Nicolini has joined

continued on p. 54

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Research Company News

Minneapolis-based **Carlson Companies** has signed a letter of intent to sell **Carlson Research Co.** to **Total Research Corp.**, Princeton, N.J. Once the purchase is completed, Carlson will use Total Research for its marketing research, quality management and other services. Terms were not disclosed.

InterServ Services Corp., an Atlanta-based marketing services company, has reached an agreement with **Equifax** to acquire **Elrick & Lavidge**, a wholly owned subsidiary. Terms were not disclosed.

Sawtooth Software, Inc., has moved to 502 S. Still Rd., Sequim, Wash., 98382-3534. Phone 360-681-2300. Fax 360-681-2400. **Sawtooth Technologies**, which develops and markets Ci3 CATI, will continue to be based in Evanston, Ill.

Barbara Ankersmit has opened **QMark Research & Polling** at Pacific Tower, 19th fl., 1001 Bishop St., Honolulu, Hawaii, 96813. Phone 808-524-5194. Fax 808-524-5487.

Chevy Chase, Md., research firm **Nancy Low & Associates**, has added several new private sector clients. They include: Milbank, Tweed, Hadley & McCloy, an international law firm; Price

Waterhouse's Survey Research Center; Duncanson & Holt, a reinsurance manager; Sacks & Bonuccelli, a management and advisory firm; Multi-Family Initiatives Corp., a non-profit firm providing training and employment for low income housing residents; and the Maryland Nurses Association.

TeleSession Corp., New York City, has formed a market research strategic business unit to handle its

growing market research business.

QCS Houston has relocated to a larger facility located 20 minutes from Hobby Airport at 17625 El Camino Real, Ste. 100, Houston, Texas, 77058. Phone 713-488-8247. Fax 713-486-3831. The facility features two fully-equipped focus suites, a central phone room and a test kitchen.

continued on p. 34



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Let your fingers do the talking

In-bound telephone surveys invite respondents to express their satisfaction digitally

By Cindy R. Ford and Roy Ralston

Editor's note: Dr. Cindy Ford is vice president and director of research, and Roy Ralston is a project manager, for Service Strategies International, a Dallas research firm.

How many times have you received a customer satisfaction questionnaire at a store or restaurant? Did you complete the form and return it? Chances are, if you were totally delighted or extremely disappointed and/or upset about something, you completed the survey (assuming that you were not in a hurry and that you had a pen or pencil available). What about all those other customers who did not bother to fill in the form? How can a business find out what these customers think about its products and services?

One relatively new technology that may be used in many instances is interactive voice response interviewing (IVRI). This allows respondents to "let their fingers do the talking" by calling an 800-number and responding to a prerecorded survey using the key pad of a touch-tone telephone. (See page 12 for a case history on in-bound surveys.)

Developing an IVRI survey is quite similar to developing more traditional (e.g., telephone) surveys. Individual questionnaire construction generally involves a decision regarding the number of closed-ended and open-ended questions as well specification of the reportable form such open-ended statements will take (transcribed, taped, etc.). The interview (which may include personalized greetings) can last as long as 15 minutes with response rates expected to fall within ± 5 percent of traditional methods, though response must vary across studies, prod-

ucts and respondents. Nonetheless, recent research has found that 96 percent of respondents finished two- to three-minute interviews (99 percent with incentive); 90 percent finished five-minute interviews (95 percent with incentive); and 70 percent completed 10-minute interviews (88 percent with incentive).

In further contrast to more traditional approaches, previous research indicates that respondents perceive automated interviews to be less intrusive and more interesting and shorter than paper interviews. Respondents are also more willing to be honest (in terms of negative and positive responses) during automated inquiries. Many find greater comfort in the anonymity of the IVRI process.

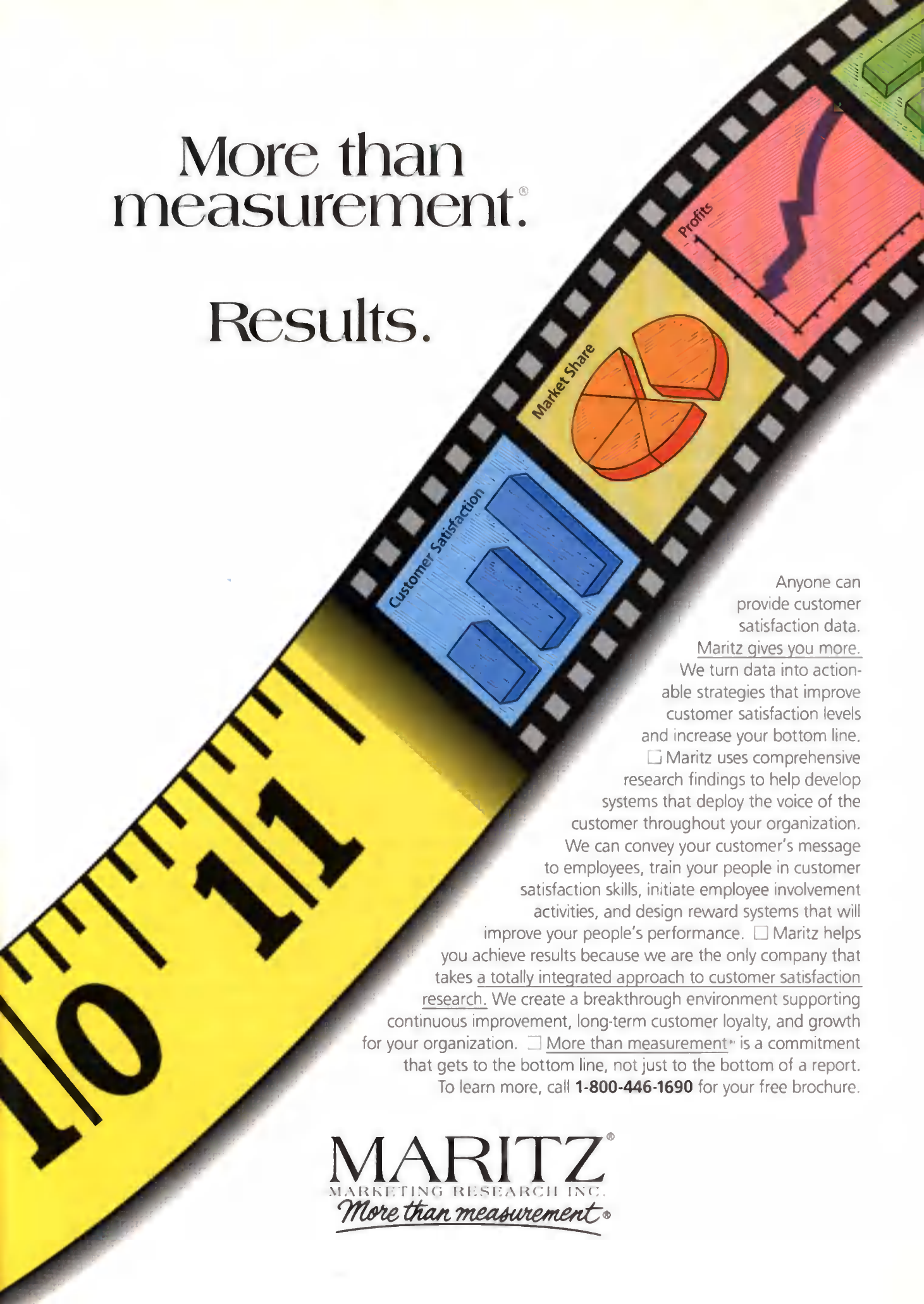
In the end, all is for naught if the responses are not reliable (across the same or similar subjects). Used in conjunction with sound methodological development of the survey, IVRI can produce as reliable results as many other survey methods while providing some significant advantages. In terms of survey administration, the problem of interviewers "coloring" the open-ended questions while capturing them is avoided, as the recorded responses are truly verbatim. Further, in more traditional telephone survey methods, the window for customer interviewing is short (generally in the neighborhood of 7:00 p.m. to 10:00 p.m.). However, with IVRI, automated interviews can be conducted 24 hours a day, seven days a week.

IVRI has other advantages. For instance, each respondent hears the same recorded voice with no tonal

continued on p. 45

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Raising customer satisfaction through expert system analysis

By Timothy R. Kula

Editor's note: Timothy R. Kula is director of customer satisfaction for the Gilmore Research Group, Seattle.

In today's global marketplace, it is not enough to just measure customer satisfaction. To be competitive, businesses need to continually make improvements that will raise customer satisfaction so they can increase what ultimately determines their financial health — profitability.

While measuring customer satisfaction is the all-important first step, unless measurement is linked to improvements, its ability to bolster the bottom line is minimal. This article suggests a new technique that allows you to do both simultaneously: measure customer satisfaction and have a positive impact on profits.

For some companies, measuring and raising customer satisfaction is a centralized process. Often these companies have only a few locations that interact with customers, in which case customer sampling and centralized reporting of customer satisfaction results makes perfect sense.

However, many companies have wide distribution networks (which are generally independently owned) that interact with customers. Customer satisfaction data gathering for these companies needs to be either a complete census or at least a statistically significant sampling at an

individual outlet level.

Detailed and customized analysis of customer satisfaction data by individual outlet has not traditionally been done because the task is labor-intensive and time-consuming — and because reporting is not easily understood by non-analytic users. Expert system analysis overcomes the problem by enabling rapid, detailed analysis and truly actionable reporting of customer satisfaction data to be performed for every outlet.

By taking an individual outlet's data and running it through an expert system, a prioritized list of targeted improvement areas is tailored for each outlet. Importantly, the report is designed so that it can be easily understood and used by company field and outlet personnel.

Traditional reporting from customer satisfaction programs can be divided into two basic categories: data and graphics. Unless you're an analyst (and the people who can actually make improvements usually aren't), the reporting can prove frustrating.

Reports with lots of data — for instance, a multi-page report with hundreds of numbers — can be confounding to a territory manager, outlet owner, salesperson or customer service representative. They elicit responses like What do the numbers mean? Which number is most important? What do I

need to be working on?

Give me graphics, they say, at least I can understand them. But wait, the graphics are oversimplified and don't provide the detail that's required to identify and fix real customer problems. If only an analyst could be everywhere to explain the numbers, what's most important, and what needs to be done to raise customer satisfaction. Just think what could happen to sales and profitability.

With the implementation of an expert system, this becomes a reality.

A brief history

What is an expert system? It is a computer capability that captures the knowledge of a domain expert to solve a set of problems. Think of it this way: You're an expert at market research analysis; the computer is proficient at high-speed data processing. Combine the two and expert analysis can be performed thousands of times in a matter of seconds.

Expert systems gained prominence in the early 1970s and have been used in many diverse fields. Expert systems have diagnosed and prescribed cures for diseases; configured complex mini-computer systems; provided aircraft mechanics with advice on how to repair helicopters; and evaluated information

continued on p. 51



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Reengineering the marketing research function

The information management department in the year 2000

By Larry A. Constantineau

Editor's note: Larry A. Constantineau is principal of Marketing Viewpoints, Inc., a Minneapolis research and consulting firm.

As many corporate-side research practitioners know from personal experience, the marketing research profession is one of evolving roles, enhanced responsibilities and significant challenges. Increased marketplace competitiveness, scanner-based market data and "single-source" information systems, higher-order analytics coupled with rapidly advancing computer hardware and software technologies have all dramatically changed the nature of the field in the last 10 to 15 years. In fact, the only constant today appears to be one of accelerating change.

How can corporate marketing researchers cope with this scenario? Obviously, the traditional management practices of restructuring, realigning or redeploying internal resources and capabilities are not sufficient for today's business issues and demanding, action-oriented managers. Witness the continued "downsizing," "right-sizing," "outsourcing," and/or "rationalization" of the marketing research functions in many companies. One might correctly assert that many of these internal research practitioners are out of touch with the reality of the situation. More

dramatic actions are needed for these times; reengineering may very well provide the means to cope with the changing landscape.

Reengineering, according to author Michael Hammer, involves the "fundamental rethinking and radical redesign" of strategic processes that cut across the fabric of the business enterprise. Recent experience has shown that by adapting and adopting many of the established principles of reengineering, corporate research practitioners can lead the redesign process and benefit from the resulting actions, rather than being unwilling recipients of imposed changes.

Generally speaking, marketing research is the process of acquiring, synthesizing and disseminating relevant market data, information and insights to decision makers in ways that mobilize the organization to take appropriate actions that, in turn, maximize business performance. Reengineering the marketing research function has the potential to affect virtually every aspect of the company. Few other processes in the organization influence so many other areas of the company as does a properly positioned and executed research and information function.

With this in mind, the company's marketing research function can (and should) act as a catalyst for business process redesign. After all, research and information is the fuel for the organiza-

tion—it's high octane stuff. Who better to fill the company's tank than the resident research function?

To date, few marketing research departments are publicly known to have truly reengineered their basic processes. While a few innovative organizations have taken steps in the direction of radically redesigning what they do and how they do it, the great majority (if they have done anything at all) have employed the more traditional methods of simply restructuring and/or realigning existing resources to help satisfy the increased demands placed upon their functions. At best, this has served as a band-aid approach; more dramatic structural changes are required for lasting impact and enhancing the vitality of the internal marketing research capability.

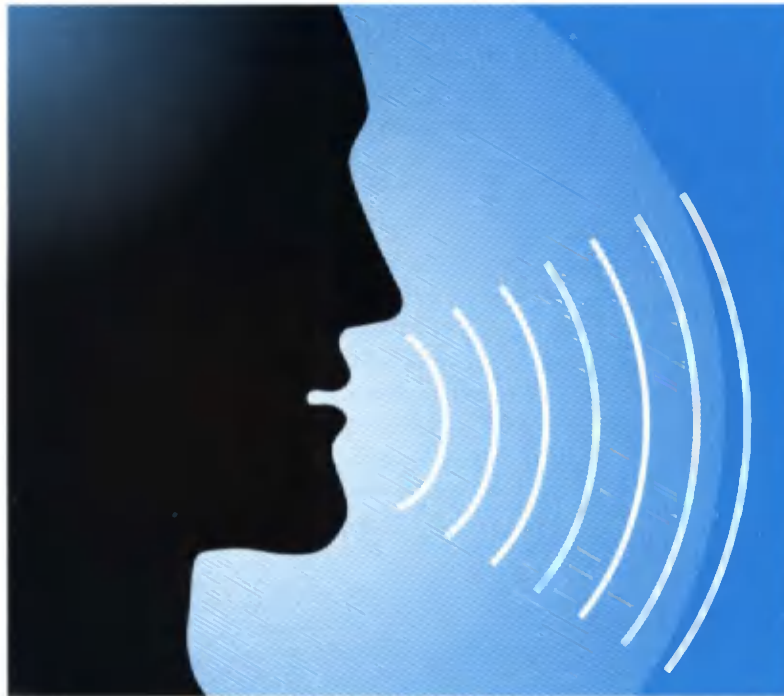
Reengineering the marketing research function is hard work. Process redesign in this area is a blending of art and science, and the potential for failure is high. While there is a logical flow of events, arriving at a viable organizational solution is more of an iterative process of discovery, learning, testing and modification. While experience has shown that there are about a dozen potential patterns that can be tested for fit, a fair amount of informed judgment is required to optimize the outcome.

What should you keep in mind if you

continued on p. 63

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Survey Monitor

continued from p. 6

programs including music videos. Fox is the most popular network and "Home Improvement" is currently the most popular show among today's teens. They devour media in all forms: 96 percent have a VCR and 79 percent have rented or bought a videotape in the past few months.

Overall, American teens have a very positive view of technology and its impact on their future. Most think innovations and advances in technology will help them gain a better lifestyle than their parents. An overwhelming majority of teens (90 percent) expect to go on to college.

The source of this data is teen.com, a quarterly syndicated survey of teen attitudes and interest in media and high technology products, including a linked computer bulletin board panel. For more information, contact Carla Sarett at 610-964-4923 or online at cjsarett@aol.com

Hispanics not charged by credit cards

While most Americans consider them an indispensable tool for daily life, credit cards have yet to find their way into the wallets and purses of many Hispanic consumers. Data from Market Development, Inc.'s March 1995 study, reported in MDI's Hispanic Perspective newsletter, show half of Hispanic adults have never used a major credit card. Limited usage is present despite the fact that more than two-thirds of Hispanics have used savings and checking accounts and opted for monthly payments when purchasing expensive items such as televisions, automobiles and furniture.

Familiarity with credit cards — both how to acquire them and what their benefits are — is higher among the more acculturated U.S.-born Hispanics, who report greater use of financial products overall. Two of the major factors that impact the low usage of credit cards among less accultur-

ated Hispanics are not getting enough information about credit cards and not fully understanding their advantages.

Financial institutions have attempted to broaden the use of credit cards among Hispanics through direct mailings, but their effects do not seem to be translating well. Nearly eight out of 10 respondents remember receiving credit card solicitations at their home. Unfortunately, the English language solicitations by mail may lose much of their impact among Spanish-dominant consumers.

The absence of Spanish language solicitation along with the fact that only one in five Hispanics have sought information by contacting a bank in person or by phone explains in part the low credit card usage among Hispanics.

When comparing attitudes towards the use of credit cards with the more frequently used installment plans offered by retailers, more than half of Hispanics seem to be turned off by the impression that credit card purchases may cost them more in the long run. Hispanic shoppers are also more likely to consider monthly payments safer and less complicated than credit cards.

Undoubtedly, marketers at financial institutions can find much room to grow among U.S. Hispanics but only if building awareness and image are considered as the initial steps. For more information, call 619-232-5628.

On-line, telephone surveys yield similar results

To test the effectiveness of on-line research, Custom Research Inc., Minneapolis, in conjunction with a major on-line service, conducted a survey on cellular phone usage. CRI also conducted a similar survey using conventional telephone interviewing. Questions ranged from ownership and usage of cellular phones to brands of cellular phones owned.

The on-line survey amassed a large



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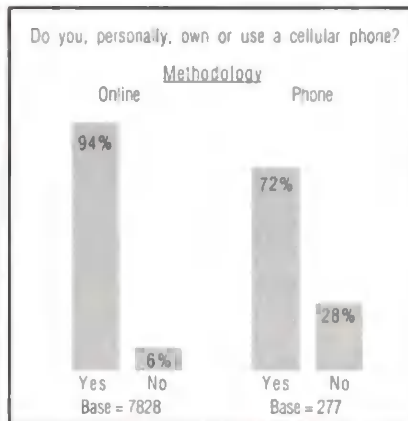
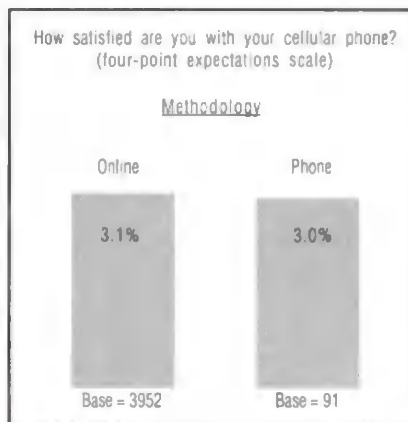
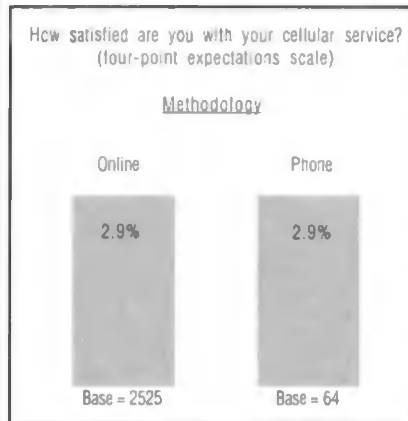


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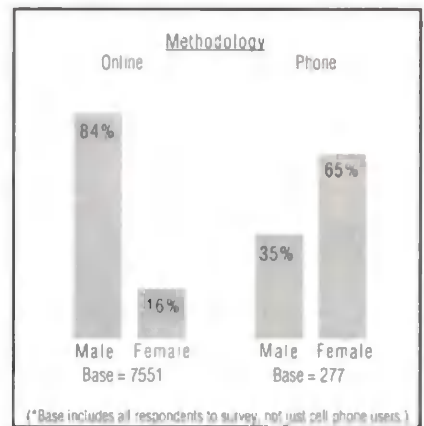
and rapid response. Within 36 hours after the survey was announced on the service's marquee, over 7,600 interviews were completed. This number of interviews would require almost 2,000 hours of traditional telephone interviewing. Still, results of both surveys are comparable.

Below are examples of the questions asked and their results.



While results of the research are alike, there are caveats with the new methodology. For example, demographics of the on-line research skew toward

younger, more affluent, male audiences, as shown below.



However, as with any new technology, over time the population of on-line users should expand, providing a more representative sample. For more information, call Beth Rounds or Lindsay Willis at 612-542-0800.

Why do we exercise?

A national survey on the relationship of exercise, well-being and health among Americans aged 18 and older finds that men and women who use a fitness center give the same top five reasons for exercising, although they place them in different orders.

The findings were released by the Fitness Products Council, a principal sponsor of the study. "What may be surprising is the importance females attach to muscle development and the appreciation men have for the emotional benefits," says Gregg Hartley, executive director of the Fitness Products Council.

The top five reasons given by both males and females for exercising were: weight control, increasing energy, toning muscles, feeling good afterward and cardiovascular conditioning. Females ranked weight control first, men voted for muscle toning.

The next six were stress reduction, keeping flexible, having time for oneself, enjoyment of exercise, building strength and improving self-esteem. Strength-building made the top-ten list among males, but not among females, who chose improving self-esteem.

"Toning muscles was ranked as important by 84.3 percent of females and

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84.7 percent of males," Hartley says. "Building strength is important to 72.2 percent of females, 76.5 percent of males. It may surprise some people to see the importance women attach to muscle tone and strength, but this is a trend we have seen developing for some time."

Hartley points out that five of the top eleven reasons for exercising were related to feelings, not physiques: feeling good afterward, stress reduction, having time for oneself, enjoyment of exercise and improving self-esteem.

The survey also compared feelings about health, happiness and longevity among those who exercise frequently and those who don't. Three groups were measured: health club users, non members of health clubs who work out at home or outdoors, and inactive people.

Some other findings:

- Thirty-two percent of those who exercise in fitness centers feel their health is excellent, compared to 23 percent of home/outdoor exercisers, 10 percent of inactives.

- Nineteen percent of fitness center exercisers expect to live longer than average, compared to 17 percent of home/outdoor exercisers, 8 percent of inactives.

- Twenty-three percent of home/outdoor exercisers feel they are happier than most other people, compared to 22 percent of fitness center users, 15 percent of inactives.

For more information, call Gregg Hartley at 407-840-1161.

Work – not leisure – is the important thing

Americans, supposed models of the puritan work ethic, consider work less important than do people in many other parts of the world. In fact, Americans are almost equally divided on the value they place on work versus leisure, according to a new study among 37,743 people in 40 countries. The survey was coordinated by Roper Starch Worldwide and conducted by its International Research Associates (INRA) affiliates.

When asked their views on "the relationship between work and leisure time," 39 percent of Americans say, "Work is the important thing — and the purpose of leisure time is to recharge people's batteries so they can do a better job." Meanwhile, 37 percent feel that, "Leisure time is the important thing — and the purpose

of work is to make it possible to have the leisure time to enjoy life and pursue one's interests."

Another 20 percent voluntarily say they are both are about equal in importance, and 4 percent "don't know."

The largest number — majorities — in Brazil (72 percent), the Philippines (67 percent), Venezuela (66 percent), Saudi Arabia (61 percent), and Turkey (58 percent) believe work is most important and the purpose of leisure is to recharge people's batteries to do better work. In contrast, Italy (16 percent), Hong Kong (20 percent), Japan (20 percent), Switzerland (22 percent), and Singapore (22 percent), are least likely to place work over leisure.

Half or more of individuals in Poland (60 percent), Great Britain (56 percent), Australia (53 percent), Denmark (50 percent), and the Czech Republic (48 percent) believe leisure time is most important and that the purpose of work is to make leisure possible.

Residents of Saudi Arabia (11 percent), China (14 percent), the Philippines (14 percent), and Thailand (14 percent), and Russia (17 percent) are least likely to say leisure is most important.

Majorities of individuals, primarily Asians, for whom balance is part of their spiritual and philosophical perspective, believe work and leisure are equally important: Hong Kong (61 percent), Singapore (58 percent), Japan (55 percent), Italy (54 percent), and China (51 percent).

People are least likely to voluntarily say work and leisure are equally important in Poland (7 percent), Mexico (8 percent), Venezuela (8 percent), Great Britain (8 percent), and France (11 percent).

"Our studies indicate that over the past 20 years, Americans have shifted their values from a focus on work toward more leisure," says Thomas A.W. Miller, senior vice president at Roper Starch Worldwide. "Economic instability and resulting corporate downsizing may largely account for the public's shifting priorities. Rather than making their job of utmost importance, time spent on personal enjoyment in life, whether alone or with family or friends, is increasingly important as well. Indeed this study indicates work is the clear priority in very few countries worldwide, and this may influence which countries most successfully compete in the global economy — including the U.S."

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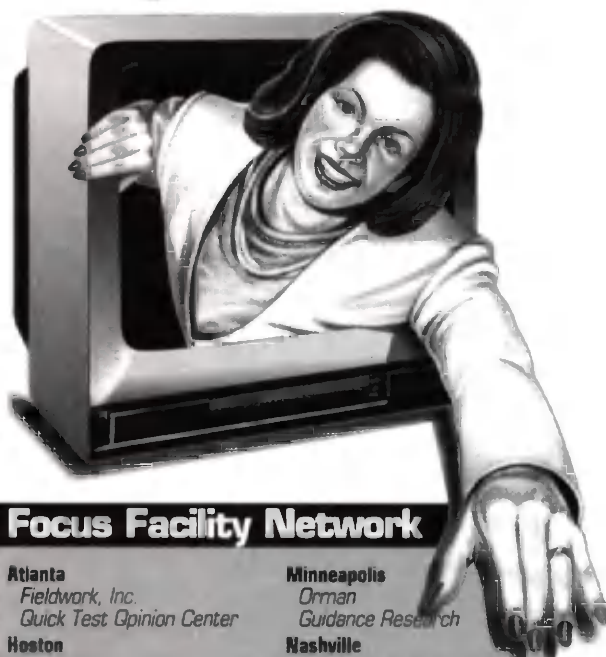
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Los Angeles Orange County <i>Trotta Associates Irvine, CA</i>	Westchester, NY <i>Fieldwork, Inc.</i>



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Research Company News

continued from p. 21

Fieldwork has opened a new focus group facility in Orange County, Calif., featuring three conference rooms. For more information call 714-252-8180. In addition, the company has remodeled its Chicago North facility. For more information on the Chicago location call 312-282-2911.

Gordon S. Black Corp., a Rochester, N.Y., research firm, was one of four recipients of the 1995 New York State Governor's Excelsior Award for Quality. The annual award, which is modeled after the Malcolm Baldrige National Quality Award, is given to organizations whose commitment to quality and customer satisfaction establishes a standard for other firms and institutions to emulate.

The state of Oregon has awarded a multi-year contract for state lottery market research to **MarketVision Research, Inc.** of Cincinnati, Ohio.

Erin O'Mera has opened **Applied Market Advantage, Inc.**, Eagles View Professional Park, 2798 Mack Rd., Fairfield, Ohio, 45014. Phone 513-942-1334. Fax 513-942-1336.

Rickie Kruh Research has opened an office in Davie, Fla., which will provide mystery shopping services, competitive mystery shopping and full service marketing research. For more information call 407-626-1220.

Retail Detail, Inc., a Birmingham, Mich., firm that provides merchandisers, mystery shoppers and field research workers, has redirected its business to act as a con-

sultant to companies with various field merchandising needs.

Northeast Data Collection Inc., has moved its Boston mall operation to the newly renovated Assembly Square Mall, five minutes from downtown Boston. The new address is 133 Middlesex Ave., Somerville, Mass., 02145. Phone 617-776-5530. Fax 617-776-5532.

NFO Research, Inc., Greenwich, Conn., and **IPSOS, S.A.**, Paris, have signed an agreement to launch access panels in five European countries. Operations will begin during 1995 in France, Germany and the U.K., while operations in Italy and Spain will commence in 1996. Others will be added as the market potential is established.

Market Facts, Inc., has opened an office at 65 Madison Ave., Morristown, N.J. The office will be headed by Gregory J. McMahon.

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Computers for Marketing Corp. has relocated its New York office to 915 Broadway, Ste. 609, New York, N.Y., 10010. The new phone number is 212-777-5120. Fax 212-777-5217.

Research International USA has relocated its New York divisions to The Park Avenue Atrium at 466 Lexington Ave., 8th fl., New York, N.Y., 10017. Phone 212-973-2300.

Sweeney International, Ltd. has opened an office in the Miami area at One Park Place, 621 NW 53 St., Ste. 240, Boca Raton, Fla., 33487. Phone 407-995-1410. Fax 407-995-1412. The company now has toll free numbers for its Miami and New York offices. Phone 800-626-5421. Fax 800-599-5688.

Catherine Bryant & Associates

has moved to 1400 Westgate Center Dr., Ste. 200, Winston-Salem, N.C., 27103. Phone 910-765-1234. Fax 910-765-1109.

SPSS Inc., Chicago, has established an office in Ireland and added new distributors in the former Soviet Union, Sri Lanka and several Latin American companies. Cathy McGennis will head the Ireland office, which will be located at Clifton House, Lower Fitzwilliam St., Dublin 2, Ireland. Phone 353-1-661-3788. Fax 353-1-661-5200.

Group 1 Software, Lanham, Md., and **MapInfo Corp.**, Troy, N.Y., have signed an agreement to jointly market and distribute Group 1's address accuracy software and MapInfo's address-matching software.

Leichter Research has moved its headquarters to 111 Washington Ave., Dumont, N.J., 07628. The mailing address is P.O. Box 125, Dumont, N.J., 07628-0125. The phone numbers remain 201-501-0707, toll-free 800-700-0707. Fax 201-501-0909.

Barnes Research, Inc., Grand Rapids, Mich., recently acquired a predictive dialer for its phone center. For more information, call 616-363-7643.

In May, employees of **Paria Group**, an Orem, Utah research firm, volunteered more than 70 hours of service at a local elementary school. The staffers assisted teachers of K-5 grade students with lessons and tests on a variety of subjects.

Total Research Corp., Princeton, N.J., has signed more than \$2 million in new business from clients in the U.S. and Eu-

rope. The company's Information Technologies division received a major software/hardware customer satisfaction survey from IBM while the company's Health Care division won two major projects from Bristol-Myers Squibb. In London, the company's European headquarters office announced new research contracts from Black & Decker for the U.K. and from 3M in the U.K., Germany and France. In other news,

Total Research has signed a new three-year strategic alliance with Total Research Argentina.

Brussels-based **IRIS** (International Research Institutes) has added two new members to its world marketing research and consulting network: Behaviour & Attitudes in Dublin, Ireland, and Mori de Mexico in Mexico City.

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Cable companies

continued from p. 18

approach to marketing. Before launching new products, service guarantees or other innovative offerings, system managers must understand their impact on loyalty, market share and revenue. And this information is needed now. The sooner companies respond with a comprehensive and integrated strategy, the more effective they will be in overcoming the vulnerabilities to new competitors.

What information, then, is needed? Requirements are many, but at the very least they include:

- estimated future market share for the cable company and competitors;
- profiles and destinations of likely defectors;
- revenue implications of shifts in market share;
- root causes of weak subscriber loyalty; and,
- product and service configurations that can build loyalty and attract

Table 1. Attributes and Options Used in Conjoint Design

Attribute	Options
Method for Receiving Signals	Personal Satellite Dish Telephone Line Microwave Antenna Cable
Monthly Fee Charged	\$20 per month \$35 per month \$50 per month
Flexibility of Channel Selection	Pre-selected sets of channels A la carte selection
Types of Channels Available	Both local and cable channels Cable channels only
Video on Demand	Available Not available
Interactive Television	Available Not available
On-Line Services	Available Not available
On Screen Programming Information	Available Not available
Time Slot Specification	Available Not available

new subscribers.

Below is a case study in which a cable system answered these questions through an innovative application of conjoint analysis.

Using information to confront the competition

In the summer of 1994, a mid-size cable company located in an urban

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east coast area was faced with new entrants in its market. Cable had approximately 46 percent of eligible homes. Microwave had taken about 2 percent of the cable providers customers. Mini-satellite dish providers Prime Star and DirecTV were preparing to enter the local market and had begun pre-launch advertising and marketing; The local Baby Bell, although not yet offering video signals, was forging ahead with its plans for cable services in the region and had received widespread publicity.

The challenge of the research was two-fold:

Given its comparatively low satisfaction score, the cable provider is fortunate not to have had its customers' loyalty seriously tested. The telephone company has not begun offering service, and very few people indicate they are well-informed about companies offering satellite dish or microwave reception. The big question of course remains: what will happen once the competitors become widely known?

- predict the future market share revenue distribution in a simulated market with up to four competing technologies; and;

- assess the impact of different product and service offerings on customer retention and acquisition.

The research was based on a quantitative study of current subscribers and non-subscribers living within the system's geographic boundaries. A self-completed questionnaire mailed to random samplings of subscribers

and non-subscribers was used to collect data. The questionnaire was structured to support conjoint analysis.

Conjoint is a multivariate technique which is used to understand respondents' preference for products and/or

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Table 2. Satisfaction with Service Providers*

	Total	Cable Subscribers	Cable Non-Subscribers ^Δ
Cable company	6.5	7.0	4.6
Local telephone company	7.8	7.8	7.8
Long distance telephone company	7.7	7.8	7.6
Primary credit card company	7.6	7.9	7.2
Electric company	7.7	7.3	7.4
GAP: Cable company vs. average	-0.9	-0.6	-2.3
GAP: Cable company vs. best	-1.3	-0.9	-3.2

* Based on those who have experience with the rated company

^Δ Includes former subscribers only

joint analysis enables the marketer to generate models to predict purchase behaviors under different market scenarios. Estimates of market share and plots of price-demand curves provide marketers with actionable information for developmental decisions.

In this case, a fairly simple conjoint design was employed. Using input from the client and exploratory interviews with subscribers, we developed a list of nine attributes for inclusion in the model (Table 1). In the questionnaire, respondents indicated their

likelihood of subscribing to 16 dif-

ferent packages, each of which included a method for receiving signals, a monthly fee and a selection of service and product options.

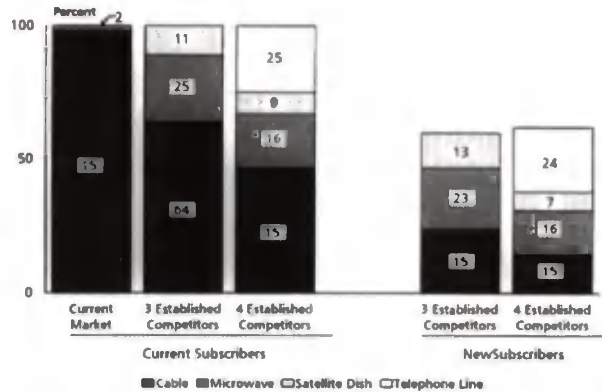
In addition to the conjoint-related question, we asked respondents about issues

expected to influence their selection of television viewing technologies, such as their satisfaction with cable and other service providers, and their awareness of emerging competitive technologies.

Competitive disadvantage

The research revealed that the cable company was at a competitive disadvantage in its market. It had the lowest customer satisfaction score among five service providers tested (Table

Figure 1. Market Share Estimates



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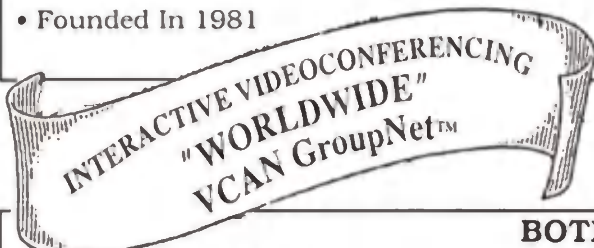
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2). In fact, on a zero to ten scale ranging from extremely dissatisfied to extremely satisfied, the cable company earned a 6.5 — a weak rating that was 1.3 points below the telephone company's moderately strong rating of 7.8. More troubling was the finding that 38 percent of the cable company's existing subscribers rated the telephone company higher than the cable company, while only 11 percent rated the cable company higher.

These figures sound an early warning. Based simply on customers' perceptions of quality of service, one would expect the telephone company

will customers gravitate on a level playing field? This is where the conjoint procedure is valuable; it predicts what may happen in the future because all respondents are given information about all their options!

In order to anticipate this future market environment, we created two simulations. The first, a three-competitor market, pitted the cable company against direct broadcast satellite (DBS) and microwave antenna. In this simulation, we

When market share estimates are combined with financial data, the bottom line implications of the changing marketplace become readily apparent. In the four-competitor market described above, the cable company's monthly revenue could drop from about \$3.1 million today to \$2.0 million — losing about \$1.1 million in out-of-pocket monthly revenue to other technologies.

to capture, at least initially, a reasonable portion of the cable company's customer base.

Given its comparatively low satisfaction score, the cable provider is fortunate not to have had its customers' loyalty seriously tested. The telephone company has not begun offering service, and very few people indicate they are well-informed about companies offering satellite dish or microwave reception. The big question of course remains: what will happen once the competitors become widely known? Where

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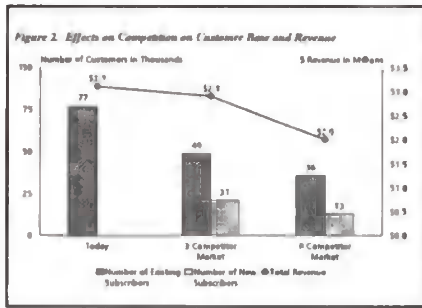
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created a market in which all competitors charge the same monthly fee (\$35), offer pre-selected sets of channels (as



opposed to a la carte programming), and offer no add-on services (such as on-line services, video-on-demand, etc.). True to reality, we limited the channel availability on DBS to reflect only cable (not local broadcast) channels, while the other competitors offered the full channel array. Furthermore, respondents were made aware that in order to receive DBS, they would

have to purchase a satellite dish costing about \$800.

In the second simulation, we added the telephone company, which also charged \$35 per month, offered pre-selected channels, no add-on services, and both cable and local broadcast stations.

Under the three-competitor market

loses 36 percent of its current subscribers and attracts only 24 percent of the total pool of new subscribers². In the four-competitor scenario, the cable company loses 53 percent of its current subscribers, and adds about 15 percent of the new subscribers. In this four-competitor scenario, the telephone company presents the greatest threat, grab-

Table 3. The Estimated Effect on Market Share of Certain Actions

	Subscribers	Non-Subscribers
Preference for Cable under 4-competitor market scenario*	47%	15%
Impact on Market Share:		
Adding Video on Demand*	+7%	+3%
Adding On-Line Services*	+5%	+17%
Raising customer service satisfaction levels to those achieved by phone company†	+12%	na

* Derived from market simulations based on conjoint utility scores and certain market assumptions
 † Derived from logistical regression analysis

scenarios (Fig. 1), the cable company

bing 25 percent of cable's existing subscribers and another 24 percent of the new subscribers (Fig. 1). The huge threat posed by the telephone company should not be surprising given its relatively strong quality of service scores.

Notably, DBS does not appear to pose an immediate threat, at least not to the extent of the phone company or microwave antenna. This is not surprising, because the study also documented the importance of high quality reception of local broadcast channels. Equipment costs may also be a factor in the decision. Both conjoint and other findings in the study show that existing subscribers and, particularly, potential new subscribers, are price sensitive.

When market share estimates are combined with financial data, the bottom line implications of the changing marketplace become readily apparent. In the four-competitor market described above, the cable company's monthly revenue could drop from about \$3.1 million today to \$2.0 million — losing about \$1.1 million in out-of-pocket monthly revenue to other technologies. In addition, \$1.4 million in new market opportunity could be forfeited monthly as new subscribers enter the market by selecting other technologies over cable (Fig. 2).

The question still remains, however, as to what can be done to stem the attrition and retain market share. Table 3 shows the impact of several activities

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on the cable company's market share. Notice, the greatest impact on customer retention is achieved by increasing customer satisfaction with the cable company's service. If the cable provider's score is raised to the level achieved by the phone company, customer retention will increase by 12 percentage points.

Other actions that will have a reasonable impact on market share, include being the first company to offer on-line services, and undercutting the competitors' price, though the latter is clearly not an acceptable long-term strategy.

Next steps

To effectively compete in the new market, cable companies must create organizations that not only provide first rate customer service, but are innovative and entrepreneurial as well. Around the country, cable systems are at different stages of development. For some companies, improving customer satisfaction must be the top priority. Certainly, some others already enjoy strong ratings and must now focus on new product and service offerings.

Regardless of a system's current status, effective use of information can help drive change. The system whose study is discussed here is driving its quality improvement effort through a problem detection analysis that ranks the frequency with which customers report specific service and product related problems. It is also revamping its customer satisfaction tracking program so it produces highly specific action priorities for increasing customer loyalty.

Information on customers' reactions to new product and service offerings is also essential. A feedback loop that demonstrates the market potential of new product and service offerings can fuel the creative process by allowing for continual experimentation.

Ultimately, cable companies must create entrepreneurial, innovative, customer-focused organizations. Whether it serves to motivate, by clarifying the consequences of inaction, or give guidance in targeting performance improvement activities and marketing

strategies, effective information will be critical in helping create the organizations of tomorrow. □

¹Of course these predictions are not inviolate. Particularly effective marketing strategies by

one competitor will alter market share. But assuming roughly equally competent marketing strategies among the competitors, the predictions derived from the conjoint procedure tend to be quite accurate.

²We estimate that as more technologies become available, about 60 percent of current non-subscribers will enter the market.



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Data Use

continued from p. 15

Competitive performance

Once the importance ranking of the supplier selection criteria has been determined, performance in specific areas needs to be evaluated on a competitive level. A rating scale is used to assess the performance of one or more suppliers.

Sample Scale

Excellent	6
Very Good	5
Good	4
Fair	3
Poor	2
Very Poor	1

Like importance, performance scores can be calculated in more than one way. The performance means can be calculated for each supplier giving a result like the following:

Fictitious Data

	Supplier A's Score	Supplier B's Score	Supplier C's Score
Product quality	4.75	4.88	5.23
Price competitiveness	4.26	5.51	4.47
On-time delivery	5.01	3.79	4.59
etc.			

or the Top 2 Box scores can be calculated based on the frequency distribution giving a different type of result:

Fictitious Data

Supplier A	% Excellent	% Very Good	Top 2 Box = Excellent + % Very Good	Good	Fair	Poor	Very Poor
Product quality	26	53	79	10	6	5	0
Price competitiveness	32	49	81	12	7	0	0
On-time delivery	75	15	90	10	0	0	0
etc.							

Supplier B	% Excellent	% Very Good	Top 2 Box = Excellent + % Very Good	Good	Fair	Poor	Very Poor
Product quality	31	19	50	35	10	3	2
Price competitiveness	19	60	87	5	3	5	0
On-time delivery	22	59	81	19	0	0	0
etc.							

Supplier C	% Excellent	% Very Good	Top 2 Box = Excellent + % Very Good	Good	Fair	Poor	Very Poor
Product quality	26	70	96	4	0	0	0
Price competitiveness	31	57	89	8	3	1	0
On-time delivery	29	60	89	10	1	0	0
etc.							

Analyzing suppliers' performance on a competitive level is a critical step in customer satisfaction measurement. In both analyses of performance, comparisons can be made between the different competitors on each sup-

plier selection criterion. Again, statistical significance must be considered. Is supplier B really outperforming supplier A on price competitiveness as indicated in the two charts above? Just as the t-test determined statistical significance of the importance of the supplier selection criteria, different analyses of variance can be run to determine statistically significant differences between the performance of the different suppliers on these criteria.

Overall satisfaction

At this point the company knows what is important to the customer, how well it is performing and where it stands versus the competition. It seems that the company has all of the information necessary to determine where to focus improvement efforts. Here is where analysis efforts often stop. However, overall satisfaction must be considered in addition to the impact of each issue on it. Are the issues which respondents claim to be critical or very important the same issues that impact their overall satisfaction most strongly?

First we need to obtain overall satisfaction scores for each supplier. This requires an additional question in the

After the overall satisfaction scores have been calculated, regression analysis is instrumental in pinpointing the supplier selection criteria that have the greatest impact on overall satisfaction.

questionnaire where we would use the same performance rating scale as before and ask the respondents to state their overall level of satisfaction with the different suppliers. After the overall satisfaction scores have been calculated, regression analysis is instrumental in pinpointing the supplier selection criteria that have the greatest impact on overall satisfaction.

Identification of areas of opportunity

The major analytical steps that should be a part of a comprehensive customer satisfaction effort have now been covered. The first step was to establish how important various supplier selection criteria are to customers and to use a t-test to determine whether or not any statistically significant differences exist between the stated importance of any two given issues. The next step was to evaluate the performance of different suppliers on these selection criteria and again determine whether or not statistical differences exist between the performance scores

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of the different suppliers on any given issue using an analysis of variance. Finally, regression analysis addresses the question of overall satisfaction in a more direct manner, determining which selection criteria are most strongly correlated with it.

In this example the regression analysis may show that issues other than those cited as being critical or very important by the respondents are the ones that most strongly affect overall satisfaction. The data above shows that product quality, price competitiveness and on-time delivery are the issues with the highest stated importance. There may be other issues tested in the survey such as the responsiveness of technical service, the product knowledge of representatives and order status updates that have less stated importance but a higher correlation to overall satisfaction. With this added information offered by the regression analysis, the decision regarding where to focus improvement efforts and where to allocate resources is not as simple as was first believed. Fortunately, it will now be possible to make a more educated decision.

We can now place each supplier selection criterion into one of seven categories:

1. Issues of high stated importance.
2. Issues of low stated importance.
3. Issues strongly correlated to overall satisfaction.
4. Issues weakly correlated to overall satisfaction.
5. Issues where we have a competitive advantage over other suppliers.
6. Issues where no supplier has a competitive advantage.
7. Issues where other suppliers have a competitive advantage over us.

With the results of the t-tests, analysis of variance and regression analysis, it is now clear that the categories of greatest interest are No. 3 (issues strongly correlated to overall satisfaction) and No. 7 (issues where other suppliers have a competitive advantage over us). Since there may be several issues in category seven (areas where we are at a competitive disadvantage), the information regarding overall importance from categories one and two (issues of high and low stated importance) can be also used to prioritize the areas that will be addressed first.

The ultimate goal of a customer satisfaction measurement effort is to increase customer satisfaction and increase profits. As a necessary complement to standard analysis practices in customer satisfaction measurement, regression analysis is key to obtaining actionable results from the effort. Based on these results actions must be taken and a company must have confidence that in targeting particular areas for improvement, they will be affecting overall customer satisfaction and thus have a positive impact on the bottom line. □

Interactive surveys

continued from p. 22

variations caused by interviewer fatigue or discouragement. In concrete fashion, each respondent hears each question presented in exactly the same manner, which minimizes the effects of respondent-interviewer interactions. Further, as each open-ended response is recorded exactly as articulated by the respondent, it can be replayed (during the coding stage) as many times as necessary if not understood.

One of the most exciting capabilities of IVRI in this area is its multilingual capacity. This capability allows for efficient and accurate survey administration across populations (constituting masses of consumers) with greatly varying cultural orientations. Regardless of the languages associated with any particular sampling frame (English, Spanish, Vietnamese, etc.), IVRI can be employed to reduce the cost of multilingual interviewing (compared to human interviews) while streamlining the process.

Interviewer cheating and/or error is virtually eliminated, allowing expanded control (by the survey administrator) of the entire survey process. Quota samples can be readily monitored with confidence in the automated data collection and entry procedures. The process incorporates abilities to employ elaborate branching patterns, explain questions, re-contact, etc.

The IVRI process

IVRI may be used in any consumer market regardless of the duration of sales contact. Our company, Survey Strategies International (SSI), has conducted various IVRI surveys across populations as diverse as counter services (i.e., fast food, public athletic facilities, etc.) where end-users are not identified by a list as well as other services for which end-users can be identified via a list (i.e., banking/financial services, certain retail operations, private clubs/resorts, etc.).

Regardless of the nature of the customer base, the IVRI process typically begins (after questionnaire development/pre-testing) with distribution of incentive coupons. Previous research indicates that incentives do work, but that merchandise tends to be more effective than cash. Consumers like believing they are getting something for free. Though the appearance of the incentive coupons may vary dramatically, they all contain basic items. The coupon contains a request that the customer call an 800-number to participate in a survey in which their opinions are important. Identification of the incentive and the instructions to obtain it are also reflected on the coupon in an attempt to fully inform the consumer prior to the interview.

When the customer calls, they encounter the greeting (individualized if desired) and instructions. Automated skipping provides the capability to move the respondent

through the questionnaire depending on the pattern of response. "Hot buttons" are available to record verbatim statements as needed. Further, during the course of the interview, the respondents are asked several questions allowing coding of surveys to differentiate business sites, products/services consumed, etc. This provides detailed information on patterns of operations in and across the client's business base. Finally, the respondent is given a code which he/she records on the incentive coupon to validate the coupon for redemption.

Case studies

In one IVRI study we conducted on sports programming, viewers were asked to respond to a survey on their pay-per-view habits. The survey was conducted to determine under what conditions the pay-per-view program was purchased (i.e., for a party, one host vs. various contributors toward the price of the programming, pay-per-view customers rotating home to home, etc.) and what the viewer's attitudes would be toward adding commercials to the programming. Prior to, at half-time, and at the conclusion of the event, an 800-number was displayed and the intent of the survey explained. A six-item questionnaire was administered via IVRI. Viewers who completed the survey were given a \$1 credit on their next cable bill.

Our firm has also used this methodology for a group of

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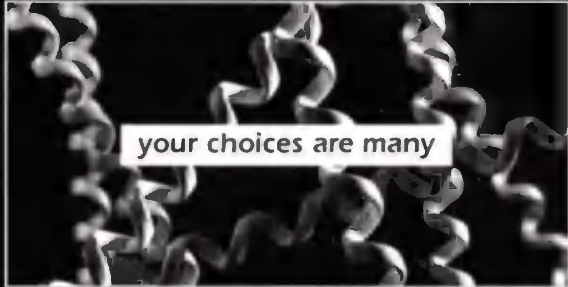
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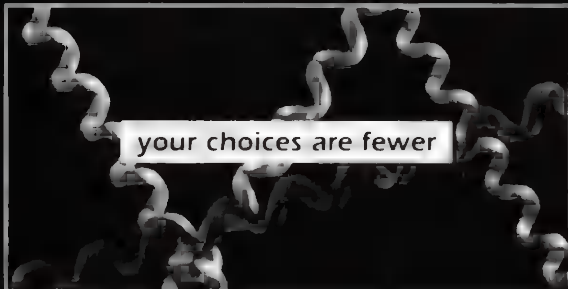
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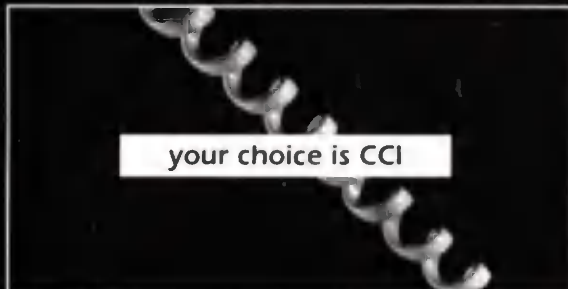
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public golf courses wishing to obtain feedback in regard to customer satisfaction with employees and facilities. As golfers paid for their round of golf at the pro shop, they were given a coupon with an 800-number and instructions for completing the survey. Each course had a unique ID number which participants keyed in at the beginning of the survey. Use of the ID number allowed responses to be tabulated and reported separately for each course. Respondents were provided an incentive of a 1/2 cart fee credit on their next visit to the same course. Additionally, the coupon asked for the respondent's name, address, and telephone number. Accordingly, when the coupon was redeemed, the name could be included on a customer database for the course.

SSI has developed extensions of IVRI for adaptation in two additional contexts: customer support/care groups and employee surveys. Companies can put to good use the flexibility of IVRI in surveying the attitudes of customers calling in to customer service help lines. Information relative to satisfaction with the product, sales or service forces, etc., can be readily obtained. This approach allows almost complete coverage of the respective universe (i.e., customers having problems in need of service) allowing management to immediately track customer attitudes, needs and concerns.

Using IVRI to confidentially assess employee attitudes is a way to establish a more comprehensive understanding of the relationship between employee satisfaction, organizational efficiency, product quality and customer satisfaction. IVRI offers a confidential interviewing format. There is no handwriting through which employees can be identified; comments are transcribed and delivered in a typed format. To facilitate the survey process, employees may be notified via computer login messages or usual office correspondence. Names or employee ID numbers can be cross-referenced against available databases to avoid duplicate interviews.

All in all, IVRI facilitates development of an integrated understanding of the dynamics between employee satisfaction, organizational efficiency, product quality and customer satisfaction on a company-by-company basis. The phrase "let your fingers do the talking" is bound to become as famous as its predecessor. □

Research Calendar

continued from p. 8

must have influenced the outcome of the campaign. For more information and a call for entries brochure, call 212-751-5656.

MRA FALL CONFERENCE

The Marketing Research Association will hold its fall conference on November 8-10, 1995 at Le Meridien Hotel in New Orleans. Session topics include statistics, scale research, the future of data collection via television and the impact that time of day and new telephone services have on respondent cooperation. Attendees will also hear results of the Council for Marketing and Opinion Research's large scale study on respondent cooperation. For more information, call 860-257-4008.

Product & Service Update

continued from p. 8

tract, block group) data on every county in the U.S. It also includes projections for the year 2000. It introduces enhancements to the product set, including a new set of procedures for estimating and projecting persons by race/ethnicity, sex, and detailed age; more residential ZIP codes, and improved ZIP code projections. UPDATE also offers an improved non-linear methodology of computing population projections; small-area estimates of housing values nationwide using data from the National Association of Realtors; and incorporates the effects of major events like earthquakes, fires, hurricanes, and military base closings. For more information, call 800-234-5973. The company has also released Workplace PRIZM, a segmentation system that is designed to help marketers understand the potential for a company's products and services based on the demographics of the workplace population. The product gives the distribution of PRIZM lifestyle segmentation clusters carried into a neighborhood by its working population. It is based on tract-to-tract commuting data produced by the U.S. Census Bureau specifically for Claritas that provides the percentage of each residential tract's population commuting into each employment tract. All types of workers are covered, including the private sector, public sector and the growing sector of people who work at home. Users of Claritas' Compass marketing software can add Workplace PRIZM at the census tract level to their system. It can also be purchased as a separate database for use in GIS software, or Claritas' PRIZM project group can produce custom Workplace PRIZM profiles and maps of trade areas. For more information, call 703-812-2700.

Updated directory of tech information sources

Washington Researchers, Ltd., Washington, D.C., has released a new

edition of "Technology Opportunities: Researching Emerging and Critical Technologies," a 500-page directory that provides direct access by phone, mail and the Internet to technology-related information resources in federal and state governments, university research centers, trade and professional associations and technology business councils. Many of the resources have public funding and are available free of charge to technology researchers and managers. For more information, call 202-333-3499.

SPSS now available for Power Mac

The new Power Mac version of SPSS 6.1 for the Macintosh offers significant speed improvements. The company claims it runs some tasks nearly five times faster than the 680x0 version. For example, an analysis of variance with a data set of 10,000 cases used to take 23 seconds using a 680x0 Mac. On a Power Mac, the same analysis takes only five seconds. The base module for SPSS 6.1

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for the Macintosh is available along with five optional modules. Two of the modules, SPSS Categories and SPSS Trends, are being offered for the first time with full Macintosh-style interface. SPSS Categories performs conjoint analysis and optimal scaling, including correspondence analysis. SPSS Trends can improve forecasting with complete time-series analyses techniques including multiple curve-fitting and smoothing models and methods for estimating autoregressive functions. For more

information, call 312-329-2400.

New ad tracking service from Research International

Research International, New York, has launched TRACE, its advertising tracking service, in the U.S. The service is already in use in 15 countries. Developed by Arthur Juchens, TRACE measures "active processing" evoked by an ad campaign. Ac-

tive processing measures the depth and intensity of a campaign's effects on consumers. For more information, call Max Blackston at 212-973-2300.

Pine Co. installs ICR system

Pine Company, Santa Monica, Calif., has installed an image scanning system based on intelligent character recognition (ICR) that provides the capability to enter and process more than 40,000 forms a day. ICR eliminates the limitations on form design imposed by optical mark reading. The system recognizes check boxes and similar marks and can also read handprinted characters with near perfect accuracy. While a document ideally should have a few subtle registration marks, they aren't necessary any longer. Provided an individual follows a few basic guidelines, anyone can produce and print a scannable form using standard computer programs and equipment. For more information, call 800-969-PINE.

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Pulse Train Technology, Guildford, England, now offers Bellview Pen, software designed to create and tabulate opinion surveys and market research questionnaires on Windows-based pen computers. The software runs on any pen computer that supports the Windows for Pen operating system. The questionnaires and forms created by the user can support questions requiring single or multiple responses, or even grids. For more information, call the company's American sales office 407-842-4000.

AmeriPoll is now on the Internet

Survey data from Maritz AmeriPoll, the national consumer opinion poll conducted by Maritz Marketing Research, Fenton, Mo., is now available on the Internet. By visiting the AmeriPoll homepage at <http://www.maritz.com>

www.maritz.com/apoll/ researchers can get survey data on more than 65 consumer opinion topics, a complete selection of data summaries and press releases, graphic representations of findings, and more.

Survey on-line with the Opinionater

Opinionator, a new on-line market research system developed by New York-based CLT Research Associates, Inc., is a live, ongoing, interactive consumer dialogue and data gathering system, offering complete bulletin board and conferencing systems. The system is fully managed by CLT from beginning to end — the company designs an exclusive program for each client, targets and recruits a specific market, runs the program and interprets and delivers the results. Marketers can communicate directly with consumers and monitor their responses as often as they wish through formal on-line questionnaires, live group discussions moderated by CLT

Associates or the client representative, private one-on-one discussions or bulletin boards. In addition, discussion topics and groups can be updated and modified as often as necessary throughout the process. For more information call 212-779-1990.

CRS opens BBS for Survey System users

Users of version 5.0 of The Survey System by Creative Research Systems, Petaluma, Calif., can now dial in to download the latest updates of files at no charge. The BBS is available 24 hours a day, seven days a week. Users should dial 707-765-6931 and set their modems to 8N1. For more information, call 707-765-1001.

Trans Union adds new sorvicos

Trans Union Corp., Chicago, has new custom modeling and analysis services that individually and collectively provide marketing and credit-

related information. The new services are built around TranSelect and Trans Union's Standard Characteristics. TranSelect consists of 59 credit characteristics that are used to develop customized response models for direct marketers, banks, credit grantors, retailers and insurance companies. The models rank consumers most likely to respond to an offer based on the client's own mail response data and the most predictive of the TranSelect characteristics. Trans Union's Standard Characteristics consists of more than 300 predefined credit characteristics available for model development, data analysis, evaluation of existing of prescreen selection criteria or to assist in creating prescreen selection criteria. For more information, call 800-899-7132.

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System analysis

continued from p. 24

that led to the discovery of geologic deposits worth hundreds of millions of dollars. An expert system even helped a race car driver break the speed record at the Indianapolis 500. (There are several good sources on expert systems. One is "The Prentice Hall Guide to Expert Systems.")

However, despite their potential for solving problems, expert systems are still little-used in many areas of business, including market research.

My own experience includes designing and implementing an expert system for analyzing customer satisfaction data as a consultant to large-scale international companies. Recently, as the director of customer satisfaction for the Gilmore Research Group in Seattle, I have developed the core expert system capabilities that can be applied across any customer satisfaction data set.

Expert systems hold tremendous potential for rapidly analyzing vast streams of customer satisfaction data and generating truly actionable reporting. Before I tell you more on this score, let's first take a look at what characterizes an expert system.

Expert system methodology

The purpose of the expert system is to model an expert's problem-solving strategies. The domain expert, by definition, is a knowledgeable person with a reputation for effective solutions in a particular field. This expert status includes the ability to arrive at solutions efficiently. The key to an expert system is the accumulation and codification of the expert's knowledge.

The expert's knowledge is translated into a series of if-then-else statements for the computer to process. To demonstrate, a simple weather forecasting model can be built. Let's say the simplest way to predict the weather for tomorrow is by saying it will be the same as today's. Our if-then-else statement would be:

• IF the weather is sunny today,
THEN it will be sunny tomorrow, or
ELSE it will be rainy.

This statement alone does not lead to very accurate weather forecasting.

Thus, we need to add further rules:

• IF the TV weather person says it will be sunny, THEN it will be sunny, or ELSE it will be rainy.

• IF the season is summer, THEN it


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will be sunny, or ELSE it will be rainy.

Or maybe . . .

• IF a picnic is planned, THEN it will be rainy, or ELSE it will be sunny.

Many other variables such as barometric pressure, wind direction, weather in adjoining states and views from satellites could also be incorporated. As more knowledge is added, our weather-forecasting model becomes progressively more accurate.

Of course, this is a simplified example of a much more complex task. It does, however, illustrate the basic building block of the expert system: the if-then-else statement, also known as a decision rule. At their core, expert systems are nothing more than an expert's knowledge formalized in a computer as a series of decision rules.

Now let's see how an expert system can greatly improve data analy-

sis and reporting in customer satisfaction programs.

Applying an expert system to customer satisfaction data

Just as in our weather forecasting model, the first step in applying an

be made. For example, you could compare:

- an outlet to other outlets in their territory, region or nationally;
- an outlet to same-sized outlets;
- outlets to a standard of performance; or

FIGURE 1

Analysis Type	Typical Field Level Analysis (single variables only)		Expert System (single or multivariate)	
	Overall Satisfaction Questions	Detailed Satisfaction Questions	Overall Satisfaction Questions	Detailed Satisfaction Questions
Comparison to peer group avg.	Yes	No	Yes	Yes
Comparison to fixed standard	No	No	Yes	Yes
Period to period change	No	No	Yes	Yes
Trend	No	No	Yes	Yes

Detailed analysis for individual outlets is not typically done because the data is too cumbersome. The rapid analysis capability of an expert system solves this problem.

expert system to customer satisfaction data is to establish the decision rules — only this time you and the research sponsor are the experts.

What are the appropriate analytic comparisons? This will dictate the decision rules. Let's say you are a large company that sells business-to-

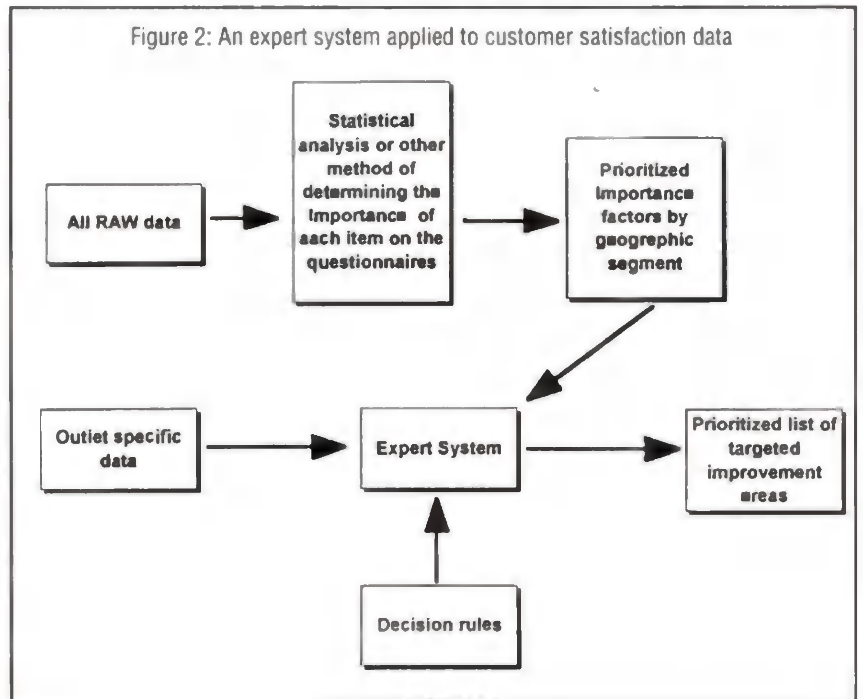
- outlets to pre-determined improvement goals.

While on the surface this may appear to be ordinary analysis and reporting — the comparison of composite factors at an overall satisfaction level — what differentiates the expert system is its ability to also



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business products through 1,000 national outlets. There are a number of performance comparisons that could

make these comparisons or any combination of comparisons at a detailed question level for each outlet. These

more detailed comparisons are especially significant when customers' importance rankings of questions are applied.

There are other analysis features an expert system can employ which are typically not performed with traditional customer satisfaction analysis because the amount of data is overwhelming. Perhaps it would be beneficial for your sponsor to know changes and trends. The expert system can easily perform these types of analyses and generate clear, easy-to-use reports tailored by outlet. (See Fig. 1)

Once you've established the decision rules, you're ready to analyze data. Figure 2 illustrates the flow after the data is collected. In our example, you've collected 50,000 surveys from customers representing your 1,000 outlets. All have purchased and used various products for up to a year. The survey assesses their satisfaction with product and service features.

Statistical analysis (regression) is applied in order to rank importance factors by product or service feature, each relating to a specific question on the survey. The importance factors are fed into the expert system, along with the decision rules, and then applied to outlet-specific data. The output is a prioritized list of targeted improvement areas by outlet.

Prioritize improvements

Remember the old reports? Too much data — hard to use. Oversimplified graphics — don't tell enough. Reports generated by the expert system solve this dilemma with one simple page.

The new reports prioritize the areas that need improvement based on the importance factors established through statistical analysis of customer responses. No longer are there multiple pages of numeric data, just one page with the prioritized targeted improvement areas.

In our example, the list would be by specific product or service feature and would reference the exact question or questions on the survey. Reporting can include other valuable information for the outlet such as whether listed items reoccur over time and what percentage of customers would buy again.

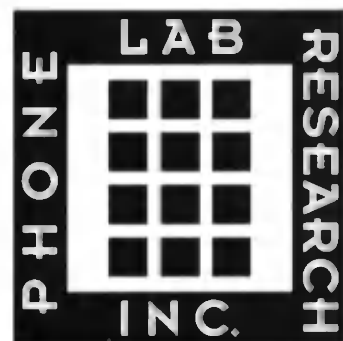
What is most important? What needs to be worked on? There is no mistake. The expert system enables you to rapidly analyze the customer satisfaction data of each individual outlet and generate a report that addresses each individual outlet's customer satisfaction issues.

Linked to improvements

If the goal of customer satisfaction programs is to raise customer satisfaction in order to increase profits, measurement needs to be linked to driving improvements. An expert system can help you achieve this goal by overcoming the limitations inherent in traditional methods for analyzing, reporting and effectively using customer satisfaction data. □

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Readers

Names of Note

continued from p. 20

Conway/Milliken & Associates, Chicago, as director of client services.

Kevin Macken has joined *Northrup King, Co.*, Golden Valley, Minn., as manager of marketing research.



Macken

Sugar

Edward Sugar has joined *Pine Company*, Santa Monica, Calif., as director, market research & marketing.

Directions Data Research, Knoxville, Tenn., has added **Kent Van Cleave** to its staff as a research analyst.

Kim Fleger, vice president of client service at *Decision Analyst Inc.*, Arlington, Texas, has been appointed executive vice president of membership services for the Dallas-Ft. Worth chapter of the American Marketing Association. In other *Decision Ana-*



Fleger

Baselice

lyst news, **Janet Baselice** has been named an account executive and **Yolanda Kommer** has been promoted to project director.

John S. Struck has been appointed managing partner and CEO of

Yankelovich Partners, Inc., Norwalk, Conn. In addition, **Amy Steiner Schafrann** has been named head of the Yankelovich **MONITOR** group.

Ruth A. Nelson has joined the Taylor, Mich.-based *Polk Company's* Product Management & Marketing business unit as vice president-marketing.

Pathfinder Research Group, Inc., Acton, Mass., has announced several personnel changes. **Jon Godin** has joined the company as project director; **Carolyn Fraleigh** has been promoted to project coordinator; **Glenn Baptiste** and **Lauren Carpenter** have been promoted to project directors; and **Annette Arno**, **Pam Bentley** and **Steve Kalter** have been promoted to senior project directors.

Gunilla Broadbent and **Robert**



Broadbent

Skolnick

Skolnick have been named principals of *Behavioral Analysis Inc.*, Tarrytown, N.Y.

Ron Kornokovich has resigned as a principal of *Consumer Pulse, Inc.*, Detroit, Mich. The firm will continue to be owned and operated by **Richard** and **Karen Sams Miller**. Kornokovich will continue the operation of his Cleveland data collection firm under the new name, *Opinionation*.

Sheri Lambert has joined *Chilton Research Services*, Radnor, Pa., as research consultant for the Business & Industry Services Group.

Mary Bryant has been promoted to branch manager of the Nashville office of *Quality Controlled Services*.

Steve Jones and **Laurie Forehand** have joined *Microtab, Inc.*, Atlanta, as account executives.

Forrester Research Inc., Cambridge, Mass., has named **Thomas Pincince** as senior analyst in its Network Strategy Service.

Total Research, Princeton, N.J., has appointed **Mark Nissenfeld** as vice president, managing director of the company's Health Care Division.

Lorraine Kozon has been promoted to vice president, strategic planning and research at *Jack Levy Associates*, a Chicago ad agency.



Kozon

Willson

Audrey Willson has moved to the firm's research department from its marketing services department as a new research account executive.

Pat Sabena, of *Sabena Qualitative Research Services*, Westport, Conn., has been elected the 1995-96 president of the *Qualitative Research Consultants Association, Inc. (QRCA)*. She replaces **Irving Merson** of *Merson/Greener Associates*, Tarrytown, N.Y., who served as president for the past three years. Other newly elected officers: vice president — **Alice Rodgers** of *Rodgers Marketing Research*, Canton, Ohio; secretary — **Bonita Perry** of *Bonita L. Perry Associates* of Wynnwood, Pa.; and treasurer — **Christopher J. Herbert**

of *The Insight Group*, Phoenix.

Jane Crane has joined the Los Angeles office of *Maritz Marketing Research's* Performance Measurement Group as a senior account manager.

Donald Dietrich has joined *Chilton Research Services*, Radnor, Pa., as vice president and group manager of the company's Business & Services Group.



Dietrich

Brennan

Carol Cedrone Brennan has joined the *Momentum Group, Inc.*, East Longmeadow, Mass., as director of research and planning.

KLD Marketing Research, Inc., Valparaiso, Ind., has added several people to its operations staff: **Pattie**

Blake assumes accounting and payroll functions; **Mary Jo Crewdson** acts as project director; **Sharon Hall** becomes staffing coordinator; and **Kimberly Nieckula** continues as project facilitator.

Rockwood Research, St. Paul, has added **Stewart Ramsey** as research consultant in its sales department.

J. Bruce Stanley has joined *The Research Spectrum*, San Francisco, as president.

MIA/R/C Research, Dallas, Texas, has promoted **Sandy Brown**, **Julie Buhrow** and **Toni Mason** to senior analyst and **Dixie Boring** to analyst. **Shelly Lujan** has also been promoted to project manager.

Julie Fivecoate has joined *Project Research*, Minneapolis, as project director for data collection. In addition, **Anne Hodges** and **Brad Kruse** have been promoted to phone center supervisor and **Stephanie Saumur** and **Tony Fritsche** have been promoted to lead supervisor.

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NSP

continued from p. 11

also answer a few open-ended questions on ways to improve NSP's service. "The verbatim responses are quite valuable as far as giving specific direction on improvement," Peppin says.

Focus groups

The content of the mail survey is a product of focus groups held with customers who had contacted NSP for help in one of the following service areas:

1. Electric design and construction — Installing new service and changing existing service for residential, commercial and industrial customers.

2. Electric services — Responding to power outages and other maintenance work.

3. Customer business office/phone center — Answering billing and service inquiries and other questions.

4. Tree trimming — Trimming, at customer request, trees that pose a danger to power lines and customers.

5. Underground utility locating service — Informing customers of buried utility lines.

6. Field sales reps — Visiting customers to discuss service problems and conservation and load management programs.

"We found that, from the customer perspective, the process is very similar across those six transactions," Peppin says. "The objective of the mail surveys is to find out how well we meet customer needs with those transactions."

Through the focus groups, NSP was able to break the customer interaction process into four steps and identify the criteria customers use to judge NSP's performance during these interactions. Each step raised a number of questions. Answering these questions in the survey would help NSP tailor its service to meet customer expectations.

Step one is accessing NSP. Do customers know what phone number to call? When they call do they get a

busy signal? Do they spend a lot of time on hold? Are they able to speak to a representative when they want to? Do they get transferred around?

Once they get access, how are they treated? Is the person courteous and knowledgeable? Are their calls returned promptly? Does the NSP representative show concern for their situation? Do they tell the customer when the work will be done and how long it will take?

Next is the overall service experience. Are NSP field service representatives courteous, knowledgeable, etc.?

Step four is the work itself. Did NSP do what it said it would do? Did the representative show up on time? Was the work completed correctly and on-time? Did the crew clean up after itself at the work site?

New programs

DRC returns the results to NSP as raw data and as summarized data reports. The open-ended comments are coded and categorized by DRC staff. DRC also quickly passes along to NSP any "hot comments" from the open-ended responses in which customers ask to be contacted by NSP or indicate there is a potentially dangerous situation with the utility service in their home or business.

The NSP research department issues quarterly and annual internal reports on the survey findings. "We report quarterly on the survey results so that our internal customers get feedback throughout the year they need to make adjustments," Peppin says. If needed, NSP can also call DRC to get mid-quarter updates to see how things are going.

The surveys have helped NSP rectify problems and institute new programs to satisfy customers in service areas that are important to them. One of those programs is a service installation guarantee, which gives customers greater certainty about when work will be completed — something the research indicated was critical for their satisfaction. "In the past, NSP couldn't tell customers exactly when the service would be completed. The

customer satisfaction research guided that improvement," Peppin says.

The research also uncovered some problems after NSP centralized its phone center. With the business office now handling a wide range of calls in addition to the typical billing-related queries, such as power outages, service installation and tree trimming requests, the volume of calls increased significantly. As a result, customers were experiencing more busy signals, longer time on hold and reduced accessibility. "The research helped us learn how many call attempts customers would tolerate and how much time they would spend on hold. With those targets, our phone center staff was increased to meet those targets and the research has shown increases in customer satisfaction," Peppin says.

When staff cutbacks resulted in a dip in satisfaction with the tree trimming service, NSP found a way to keep customers happy. By pre-inspecting customers' trimming requests, NSP made better use of busy crews' time and meet customer expectations. "Rather than send out the trimming crew right away, which we couldn't do because of cutbacks, we sent inspectors out to see what, if anything, needed to be done. As a result, satisfaction numbers jumped way up. By checking the situation first and reporting to customers we were able to bring their expectations in line with what the company can provide," Peppin says.

Deregulation

With deregulation of the utilities industry looming, customers may one day have a choice for their source of power. And once price stops being a differentiator between providers, things like stellar customer service will emerge as the critical factors in attracting and keeping customers. "Deregulation is on the horizon and how we meet our customers' needs will determine how successful we are when it occurs," Peppin says. "Our research helps us make sure we're meeting those needs." □

Long John Silver's

continued from p. 13

recalling a visit they made to a restaurant days or weeks ago, they're quite often responding to something they did hours ago. "We're getting responses from people who have just been to that restaurant that day. They respond very, very quickly while the experiences are still fresh in their minds," Mulch says.

Long John Silver's customers were asked about the food items they purchased and given a rating scale to register their satisfaction on a number of attributes. Respondents also provided standard demographic information.

Mulch says that three types of question work well in an interactive survey: rating questions, in which respondents press a key corresponding to the correct number on the scale; data entry questions, such as "How many minutes did it take for your order to be filled?"; and open-ended questions, where respondents explain why they weren't satisfied.

An in-bound survey can contain any number of skip patterns, so that if a respondent rates a product poorly, for example, the program will take him or her to an open-ended question to probe their thoughts further, with a request such as, "Please tell us in your own words why you rated the product so low."

Respondents to the open-ended questions aren't told how much time they have to respond but Mulch reports that 45 seconds is typically enough time. Once they are through they press a key on the phone.

Clients receive the open-ended responses in transcribed form or on a cassette tape. The system also allows clients to call in and listen to the verbatim responses. So, for example, a store manager or an area manager can call up and get a quick read on customer satisfaction.

Safeguards

The system includes safeguards to prevent duplicate responses, Mulch says. "We can put a control device into the survey — for example, having respondents enter their phone number. If someone with that number has already called in, the computer would say 'I'm sorry we've already received a response from your household. Thanks for calling,' and give them validation code anyway."

The system also can keep track of responses by store, allowing for limits on the number of responses from patrons of one location. "When the respondent calls in, they enter the store number and that raises the counter on that store so once they hit the target number the database cuts it off and says 'We're sorry, we've completed the interviews for this store.' Even though they've reached their quota, the respondent still gets the validation number to get their free meal, to reward them for going to the trouble of calling."

Strength and weakness

The absence of a human interviewer is both a strength and a weakness of in-bound surveys. Because respondents are interacting with a computer, their responses may be more honest, particularly to the open-ended ques-

tions, because they aren't worried about offending the interviewer. In addition, they may feel less hesitant about revealing sensitive data such as income levels.

Another benefit of the computer-as-interviewer is that every respondent hears every question in the same way. "In a telephone survey, how the interviewer asks a question at the beginning of their shift may be different than how they ask it at the end. But the computer never has a bad day," Mulch says.

On the flip side, in-bound surveys lack the personal touch of live interviewers, most importantly their ability to probe for more information. But that drawback can be overcome with a little qualitative research. If the in-bound surveys uncover problems, they can be more thoroughly examined through focus groups or one-on-ones.

Positive impression

While in-bound surveys aren't likely to supplant good old-fashioned telephone interviews, as the Long John Silver's example shows, they offer an efficient way to talk to hard-to-reach customers. Their anonymity may also make it easier to gather sensitive information such as employee opinions. They also may show consumers that participating in research can be interesting and fun. After all, if a respondent goes away from an in-bound survey experience with a positive impression of the research process, they may be more receptive next time a researcher calls. □

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Reengineering

continued from p. 26

decide to embark upon this reengineering journey? What's it going to take for you to be successful as a researcher in the corporate setting in the next five years? The opinions and views of over two dozen leading-edge researchers were solicited to develop a top 10 list of the factors deemed critical for success — those trends that are reshaping the in-house marketing research function, and the resulting impact on how our industry is likely to change in the next few years. They also provide ample food for thought as one redesigns the process of research. While they apply primarily to the corporate marketing research environment, they obviously have importance and relevance to the suppliers who support those organizations as well.

10. A "back to basics" movement — There needs to be a refocusing on what is researched and the impact it will have on decision-making. In the last decade, some feel we have lost our way, becoming overly enamored of esoteric research techniques that have had minimal incremental impact on business success. There must be a reexamination of how research is designed and how it is actually conducted, and the resulting influence it will have on reducing risk in decision-making. Net, there will be an increased need for clear thinking and planning of research, mindful of the resulting actions to be taken once the research is completed.

9. More emphasis on market intelligence — There needs to be a more focused and concerted effort by researchers to stay in touch with customers, consumers and competitors: simply to pay more attention to what is going on in the marketplace. To that end, customer satisfaction measurement efforts will continue to grow, mature and impact business direction. Effective market intelligence requires a full-time professional effort, proactive in nature, and most

importantly, provocative to the decision makers within the organization.

8. Acceleration of the research process — Faster is better: speed represents leverage for marketers. This will likely bring into play a new, more aggressive definition of "just in time" research. Technology, especially in the areas of more advanced computers and telecommunications, will further accelerate the research process. Research suppliers as well as corporate-side researchers should readily embrace these new technologies to gain competitive advantage.

7. More strategic, less tactical — Today, the typical marketing research department spends a lot of its time and resources on urgent, small and insignificant questions, versus bigger, more important issues. Consequently, it's no surprise that researchers continue to be the focus of downsizing efforts and are underappreciated by senior management — they are spending too much time working on the tactical marketing agenda, taking daily direction from the assistant product managers. The need is to refocus on the corporate strategy issues and agenda, and to reengineer how tactical issues are researched so as to free up the resources to tackle the strategic things. In sum, research professionals need to find ways to realize a greater return on the total research investment. Senior management will continue to demand innovative ways to get a bigger bang for the bucks.

6. Technology abounds — New information technologies usually are what makes innovation possible. In the world of our future, everybody will need to be computer-proficient, not just computer-literate. Laptops will be the standard for everyone, e-mail will be universal as will be wireless communications, surfing the Net, real user-friendly decision support systems, functional marketing workbenches, integrated databases, LANs, WANs, etc. Most research and infor-

mation will be delivered via electronic means: paper reports will be impractical and obsolete. Electronic linkages between clients and suppliers will be commonplace, fluid and seamless. Note that all of these predictions will probably require a stronger partnership with the IS communities within client companies, as they often manage the technology. Researchers would be wise to build stronger bridges with their internal IS counterparts.

5. Strategic alliances with suppliers — Informal and sporadic working relationships with suppliers and consultants will give way to more continuous "preferred partnerships" and even formalized contractual arrangements. This will be true not only for the syndicated research suppliers (e.g., IRI and Nielsen) but also among survey research firms and specialized consultants. These relationships will be far more full-service in nature, involving on-site resources for three or more days a week, operating effec-

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tively as supplemental staff members and trusted confidants and advisors. These arrangements will initially be necessary due to decreased permanent staff and increased workloads, but in time will be due to demonstrated specialized competence on the part of the providers.

4. The virtual department — The research and information department of the future will be very non-traditional, more of an extended family of sorts. Organizationally, it will be flat, non-pyramidal, non-hierarchical and a hybrid of both centralized and decentralized alignments. Importantly, it will be constantly changing in size and shape to accommodate the needs and priorities of the company. As mentioned above, on-site supplier personnel will be common, as will staff members in remote, distant locations to be in proximity to their key information customers. Technology will enable this concept, with laptop computers, e-mail, wireless communications, cellular

phones, voice mail, video conferencing, pagers, and distributed computing capabilities the standard of operation. The nature of work will change as the technology allows researchers to be effective in ways never before possible.

3. Not MRD, but IMD — In the department of the future, traditional marketing research will be but a small portion of the work that is done. No longer will the function be focused almost exclusively on the marketing people; rather, researchers will support many other constituencies, perform many other functions, and contribute in many different ways. Information management might be a more accurate name for what the enhanced function provides, implying a more integrative role and a partnership with the IS function. What the department is called will have everything to do with how it will be perceived — after all, “perception is reality.”

2. The chief information officer — The research and information organization of the future will ideally be headed a CIO, an officer-level position and member of the senior management group. The CIO would, in effect, serve as the “functional evangelist” for the information management group throughout the company. Of necessity, both the traditional marketing research and IS functions would be merged in this new organization to one extent or another, thereby increasing the overall potential for synergy. Similarly, many other research- and information-like functions (libraries, consumer services, information desks, etc.) previously operating independently in diverse areas would be combined in this new organization.

1. The information generalist — Perhaps most critical to the successful information management department of the future will be a new position, the information generalist. As the name implies, this individual will serve as a strategic partner to the information customer, possessing an intimate knowledge of the customer’s

information needs and priorities, with the ability and capability to deliver on any and all of them. The IG will be a fully-equipped information professional, ideally with a minimum of seven to 10 years of diverse experiences in all aspects of the company’s research and information systems. They will be computer proficient, technologically innovative and easily adaptable to any number of customer situations.

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There you have them — 10 predictions of what the corporate research world of the future might require to be successful. Some ideas are more radical than others, some are more likely than others, while some are more practical than others. What is certain is that the role of and for research has changed dramatically in the past decade, and will continue to change in the future. A reengineered research and information function will be required to be successful — old models won’t suffice for the added demands that will be placed on traditional marketing research departments.

Reengineering the marketing research function will likely result in a radically new process that must be supported by new positions and jobs, organizational structures, management systems as well as new value systems. The principles of reengineering, properly employed on this process, offer substantial promise as a means to maximize the benefits while minimizing the problems inherent in any change effort. □



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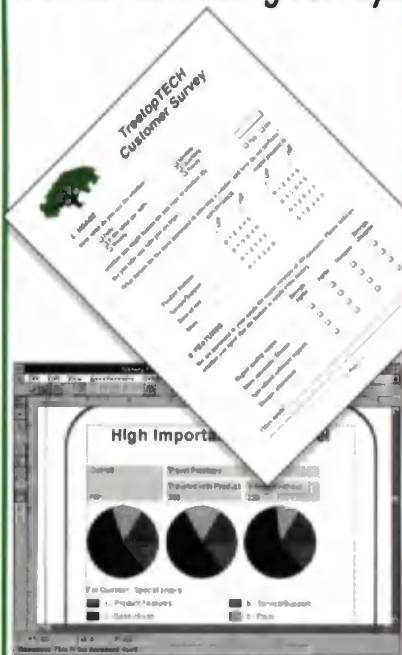
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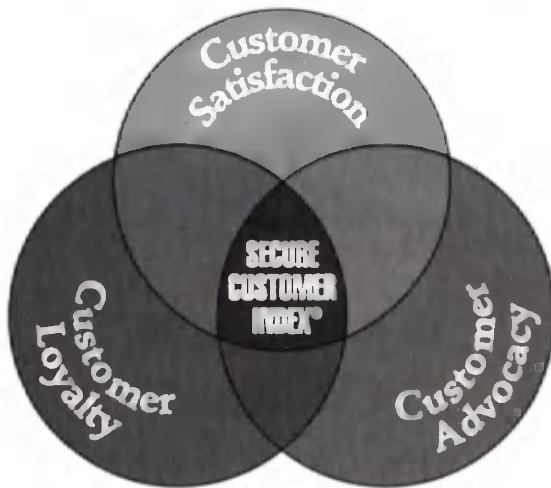
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Fax 914-834-5998
Howard Horowitz, President

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ICR Survey Research Group

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Steven C. McFadden, Executive Vice President

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(See advertisements on pp. 37, 39, 41)

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(See advertisement on p. 36)

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Intersearch Corporation
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Horsham, PA 19044
Ph. 215-442-9000
Fax 215-442-9040
Bruce Shandler, President



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Marc C. Limacher, Managing Director

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Virginia Beach, VA 23462
Ph. 804-456-1100
Fax 804-456-0377
Carla Lindemann, Vice President

JAG Systems
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Minneapolis, MN 55414
Ph. 612-331-6080
Fax 612-331-6069
Noel Jagolino, Mgr. Marketing

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Media, PA 19063
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Fax 610-565-8870
Paul Frattaroli, President

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Lynnette Bailey, Dir. Sales & Mktg.

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Ph. 212-889-5941
Fax 212-889-6066
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Fax 212-888-0140

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Fax 214-506-3505
Mike Rodington, President

M/A/R/C Research provides full-service custom marketing research, consulting, analysis of client sales/customer databases. Includes providing problem definition, information gathering/management and integration into client decision-making process. Expertise includes strategic research, customer satisfaction, new product evaluation/position, advertising/business tracking and brand equity assessment. (See advertisement on p. 72)



Maritz Marketing Research, Inc.

1297 N. Highway Dr.
Fenton, MO 63099
Ph. 800-446-1690
Fax 314-827-8605
Phil Wiseman, Marketing Director

Maritz Marketing Research Inc. specializes in customized solutions to service quality needs. Utilizing customer satisfaction measurement, customer-focused training, reward and recognition systems and communications programs, Maritz supports and drives performance improvement strategies throughout an organization. Whether you need measurement or a totally integrated solution, Maritz is the answer - nationally and internationally. (See advertisements on pp. 23, 40)

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Fax 303-670-5199
Mary Goldman Kramer, Managing Partner

Market ACTION

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Houston, TX 77063
Ph. 713-789-0652
Fax 713-789-0652
Dr. Betsy Goodnow, Owner



M.O.R.-PACE

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Fax 810-737-5326
James Leiman, Ph.D., Sr. Vice President

M.O.R., a full service research supplier, has experi-

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WHO CAN READ THE MIND OF YOUR MARKET?

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In designing a customer satisfaction research program for your company, M.O.R. research directors work closely with you to determine your specific measurement needs. On the basis of this overview, M.O.R. will recommend a research plan incorporating the methodologies, analysis plans and presentation formats that are most suited to your requirements.

For more information on M.O.R.'s strategic approach to both domestic and international customer satisfaction research, please contact Pete Haag, James Leiman or Kim Holland at 1-800-333-0746.



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 Wanda Kakugawa, President

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 V Visited before that.....

First visit V Visited before within the year V Visited before that



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 Henry Schafer, Exec. Vice President
 Carol Heller, Vice President

Product Q was established in 1988 as an ongoing measurement of consumer brand equity. An integral component of brand equity is customer satisfaction. From studies conducted twice a year, Product Q has recorded satisfaction scores on over 250 company and brand names. Questionnaires containing brand/company Logos are mailed to a national sample of adult members of The People Panel, with 1,800 completed returns in each study.
 (See advertisement on p. 75)

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MarketVision®

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Fax 804-229-1828
Nancy Fuller, Owner



**MarketVision
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(See advertisement on p. 74)

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Fax 414-436-4651
Terri Matousek, Owner



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4600 Montgomery Rd.
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(See advertisement on p. 48)



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(See advertisement on p. 74)

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Fax 212-766-0268
Arthur Zimbalist, Sr. Vice President

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Fax 770-955-5040
Mark Michelson, President

Moosbrugger Marketing Research
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La Grange, IL 60525
Ph. 708-354-5090
Fax 708-354-6813
Mary C. Moosbrugger, President

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Ph. 414-964-6604
Fax 414-964-9558
Alison Murphy, Partner

National Survey Systems
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Irvine, CA 92718
Ph. 714-753-1077
Fax 714-753-1145
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(See advertisement on p. 76)

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Fax 606-431-5838
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Next Generation Research, Inc.
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Fax 216-498-0983
Jonathan E. Brill, Ph.D., Principal

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Fax 810-827-1380
John King, President

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Fax 212-557-1290
Gregory Novak, President

NSRC (National Survey Research Center)
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(See advertisement on p. 35)

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Dan Prince, President

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Ryan Reasor, President

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John Muller, Exec. V.P.

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Fax 609-921-2611
Chris Jaworski, Vice President

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Ph. 215-222-2800
Patrick M. Baldasare, President

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Santa Ana, CA 92707
Ph. 714-241-7930
Fax 714-241-7933
Tern Pratto de Ramirez

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Fax 414-332-7377
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Daniel Vinup, Mktg. Cnslt.

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Sorkin-Enenstein
Research Service, Inc.

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Chicago, Illinois 60610
Telephone (312) 828-0702

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- What do they want?
- How well do you fulfill their needs?
- How loyal are they? Why?
- Which are your best prospects?
- How satisfied are they? And why?
- Do they know what you offer and deliver?



ARE YOU GETTING AS MUCH BUSINESS FROM YOUR CUSTOMERS AS YOU COULD?

- How can you get more of their business?

ARE YOU LOSING CUSTOMERS TO THE COMPETITION?

- And, if so, why?

SERS has been performing customer satisfaction research for over 26 years. If you'd like more information, call us or send the enclosed postcard.

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Company _____

Address _____

City _____ State _____ Zip _____

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Fax 402-434-5006
Mike Britten, President

Service Strategies International, Inc.
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Dallas, TX 75243
Ph. 214-233-3010
Fax 214-419-1555
Andy Lilliston, Exec. V.P./G.M.

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(See advertisement on p. 78)

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Fax 212-727-7492
Jeffrey Wagner, President

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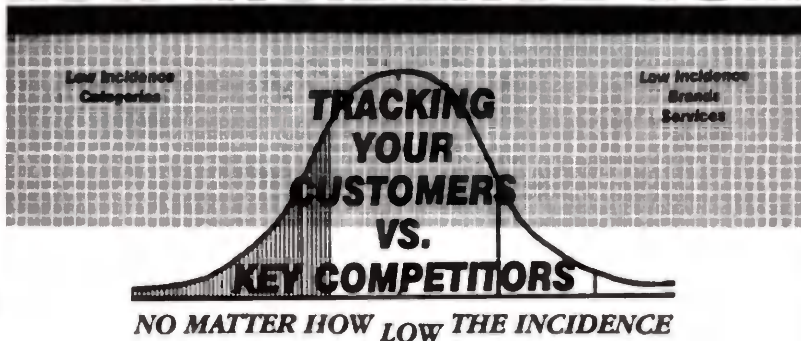
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Listing Additions

Please note the following changes to listings from the 1995-96 Researcher SourceBook (corrected text shown in bold):

On p. 52, the phone number in the display advertisement of Ted Heiman & Associates should be 818-712-4920.

On p. 81, the address for Micromeasurements, Inc. should be **4 Forest Park Dr.**

On p. 96, the second line of the listings for the branch offices of Irwin Research Services, Inc. at The Avenues Mall and Regency Square Mall should read "**Opinions**" - The Avenues Mall and "**Opinions**" - Regency Square Mall, respectively.

On p. 109, the address in the display advertisement of The Marketing Workshop, Inc. should be **3725 DaVinci Ct.**

On p. 132, the fax number for Southern Spectrum Research should be 504-539-9228.

On p. 146, the address for Barnes Research should be **4920 Plainfield N.E.**

On p. 153, the phone number for Rockwood Research Corp. should be 612-631-1977.

On p. 155, the Marketing Research Institute branch is located in Suite 209-B.

On p. 184, the phone number for Focus Plus, Inc. should be 212-675-0142

On p. 199, the phone number for The Customer Center, Inc. should be 910-768-7368 and the fax should be 910-788-7428.

On p. 201, the phone number for Precision Marketing, Inc. should be 701-232-3858.

On p. 217, the listing for the Voorhees, NJ branch office of Group Dynamics in Focus, Inc. should read Group Dynamics/**Cherry Hill**. The contact name for this office should be **Merle Holman**.

Due to an editing error, the research services cross-index categories for Horizon Research Services, Columbia, Mo., contained an incorrect page number. The company's entries in the categories of: business-to-business research; focus group facilities; interviewing services — data collection field services; interviewing services — telephone/CRT; and marketing research — full service, should be Horizon Research Services (MO) p. 155.

In some copies of the SourceBook, the full-page display advertisements for Questar Service Quality Research and Quantime Corporation appeared on pages 291 and 292, respectively. The ads should have appeared on pages **249** and **250**, respectively.

Please add the following firms to the 1995 Directory of Syndicated Omnibus Studies:

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Ph. 202-408-1832
Fax 202-408-1255
Suzanne D. Cook
National Travel Survey (O)
Travel Scope (S)

U.S. POSTAL SERVICE Required by 39 U.S.C 3685 STATEMENT OF OWNERSHIP, MANAGEMENT AND CIRCULATION 1. Title of Publication: Quirk's Marketing Research Review. 2. Publication No.: 0893-7451. 3. Date of Filing: Sept. 28, 1995. 4. Frequency of Issue: Jan., Feb., Mar., Apr., May, June/July, Aug./Sept., Oct., Nov., Dec. 5. No. of Issues Published Annually: 10. 6. Annual Subscription Price: None and \$50.00. 7. Complete Mailing Address of Known Office of Publication: 8030 Cedar Ave. So., Ste. 229, Bloomington MN 55425-1215. 8. Complete Mailing Address of the Headquarters of General Business Offices of the Publisher: 8030 Cedar Ave. So., Ste. 229, Bloomington, MN 55425-1215. 9. Full Names and Complete Mailing Address of Publisher, Editor, and Managing Editor: Publisher: Quentin T. Quirk, 8030 Cedar Ave. So., Ste. 229, Bloomington, MN 55425-1215; Editor: Joseph Rydholm, 8030 Cedar Ave. So., Ste. 229, Bloomington, MN 55425-1215. Managing Editor: Not Applicable; 10. Owner: Quirk Enterprises, Inc., 8030 Cedar Ave. So., Ste. 229, Bloomington, MN 55425-1215; Stockholder: Quentin T. Quirk, 8030 Cedar Ave. So., Ste. 229, Bloomington, MN 55425-1215. 11. Known Bondholders, Mortgagees, and Other Security Holders Owning 1 Percent or More of Total Amount of Bonds, Mortgages or Other Securities: None. 12. For Completion by

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Letters



Editor's note: This is your space to comment on the articles that appear in QMRR. We hope it serves as a forum for the exchange of ideas on all manner of research topics. When you write, please include your name, job title, company or organization name, address and phone number. Letters may be edited for clarity or space. Send letters to: Joseph Rydholm, QMRR, P.O. Box 23536, Minneapolis, MN 55423.

In his article "Regression regression" (QMRR, October 1994), Gary M. Mullet omits a missing data procedure which is superior to those he mentions. The procedure takes each independent variable which contains significant missing data, and regresses it on the remaining independent variables. This regression equation is used to fill missing data.

The advantage of this procedure is the same as the advantage Mullet cites for using the respondent's own mean on the items he or she answered for the missing items; i.e. "to some respondents there ain't no tens." However, the above procedure is better because it uses the real relationship among the items instead of a blanket average.

On another topic, there are ways of dealing with the "wrong sign" problem other than the ones Mullet mentioned. Regression on principal components and biased (ridge) regression are two techniques that effectively deal with the type of multicollinearity seen in Mullet's small data set.

Morris Olitsky
Vice President, Corporate Research and Development
The Franklin Mint, Franklin Center, Pa.



Trade Talk

by Joseph Rydholm
QMRR editor

What do clients want from a research firm?

Since this is our annual customer satisfaction issue, I thought it might be timely to talk about an aspect of customer satisfaction that's key to successful research but one that doesn't always get the coverage it deserves: client satisfaction with research companies. While I can't give you figures on the levels of client happiness with research providers, I do have some information on what clients look for in a research firm, courtesy of Market Directions, a Kansas City, Mo., research firm.

As a way to test a research technique and also to keep its name top of mind with current and prospective clients ("marketing" after all, is part of marketing research), Market Directions sent out check surveys which asked clients to rate the importance of several statements about research companies, such as, "The research company is...

- honest with me
- cares about my business
- has good marketing consultants
- a nationally known company
- flexible in meeting my needs.

Check surveys are actual checks (usually in the amount of a dollar or two) that are attached to a survey form containing a short explanation and a handful of questions. Respondents write their answers on the back of the check, detach it and cash it like any other check. After the bank pro-

cesses the checks, you've got your survey forms back.

Market Directions received 30 responses from researchers in a wide range of industries, resulting in the following top 10 list.

Marketers want to work with a research firm that:

1. Maintains client confidentiality
2. Is honest
3. Is punctual
4. Is flexible
5. Delivers against project specifications
6. Provides high quality output
7. Is responsive to the client's needs
8. Has high quality-control standards
9. Is customer oriented in interactions with client
10. Keeps the client informed throughout a project.

Close relationships

The importance of confidentiality will only increase if the trend of outsourcing continues. As marketers pare or eliminate their own research departments they are forced to enter into exceedingly close relationships with their research providers, often to the point of having research company staff on-site several days a week. To keep the relationship healthy, research firms must keep integrity and confidentiality as their bywords.

The survey also showed that companies want honesty from their research providers, specifically in terms of capabilities and limitations. "It's crucial for research companies to know when they are not suited for a prospective assignment and to only take on what they can readily deliver," says Susan Spaulding, president and CEO of Market Directions. "Being honest with the client is imperative. If your company cannot be flexible with a client's changing needs, or if a deadline is going to be missed, the client needs to be informed quickly, with a resolution offered."

There is no room for "nice to know" research, Spaulding says. "Every question in every study must be actionable today. Research companies must aggressively pursue and deliver high quality. Additionally, they must gather and process the information at Mach speed without affecting its integrity."

Learn about clients' businesses

The findings show that research companies must take the time to learn about their clients' businesses. The more they know, the better they can answer questions for their client and help them achieve success. When the client succeeds, so does the research firm. And success breeds satisfaction — for marketers and their research providers. □

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