Linking satisfaction and compensation • Setting priorities for improving service

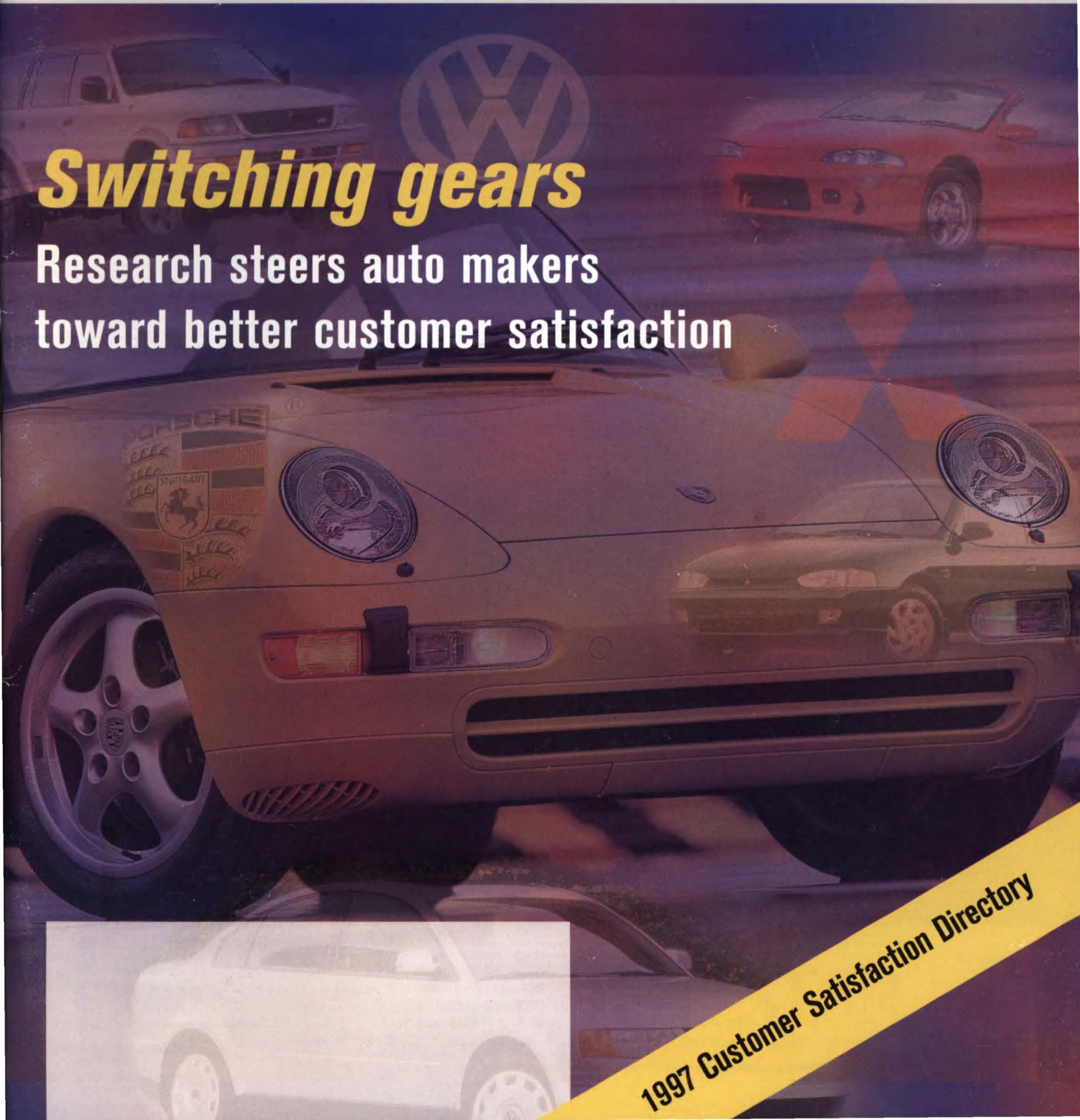
Quirk's
October 1997

MARKETING RESEARCH Review

Practical applications in marketing research

Switching gears

Research steers auto makers toward better customer satisfaction



1997 Customer Satisfaction Directory

Quirk's
MARKETING RESEARCH
Review

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Volume XI, Number 8 October 1997

Many auto makers are switching to telephone interviews for their owner satisfaction research. Photos courtesy of Mitsubishi Motor Sales of America, Volkswagen of America, and Porsche Cars North America.

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Quirk's Marketing Research Review, (ISSN 08937451) is issued 10 times per year – Jan., Feb., Mar., Apr., May, Jun./Jul., Aug./Sep., Oct., Nov., Dec. – by Quirk Enterprises, Inc., 8030 Cedar Ave., Ste. 229, Bloomington, MN 55425. Mailing address: P.O. Box 23536, Minneapolis, MN 55423. Tel.: 612-854-5101; Fax: 612-854-8191; E-mail: quirk19@mail.idt.net; Web address: http://www.quirks.com. Periodicals postage paid at Minneapolis, MN and additional mailing offices.

Subscription Information: U.S. annual rate (10 issues) $60; Canada and Mexico rate $90 (U.S. funds); international rate $119 (U.S. funds). U.S. single copy price $10. Change of address notices should be sent promptly; provide old mailing label as well as new address; include ZIP code or postal code. Allow 4-6 weeks for change. **POSTMASTER**: Please send change of address to QMRR, P.O. Box 23536, Minneapolis, MN 55423.

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Most want better ATM fee disclosure

According to a national study by Aragon Consulting Group's research division in St. Louis, the majority of Americans (81 percent) say they support legislation that would compel financial institutions to provide consumers with ATM surcharge information every time they use their ATM card.

Meanwhile, 21.1 percent of Americans with ATM cards, who were asked, do not think they ever incur transaction fees for ATM card usage and 14.6 percent do not know whether they do or not. The remaining 64.4 percent of ATM card users say they incur fees for ATM transactions: with every transaction (8.8 percent); only when using another bank's ATM machine (51.5 percent); or only for out-of-state transactions (4.1) percent. (Numbers do not equal 100 percent due to rounding.) For more information call Barbara Hohbach at 314-726-0746.

Shopping services woo car buyers

Close to three million new vehicle buyers will turn to a shopping service for help choosing a vehicle this year, a number that has almost doubled over the past few years, according to the J.D. Power and Associates 1997 Alternative Shopping Services Study: From Showroom to Cyberspace.

The report shows that about half of new vehicle buyers who use shopping services do so via the Internet. Auto-By-Tel as well as manufacturer-sponsored Web sites are part of these Internet services. This part of the market is expected to grow even more with the arrival of new entrants, like Microsoft's CarPoint, and increasing dealer participation and improved Internet and dealer service. "This is a significant finding because it shows consumers have quickly turned away from shopping only at dealerships as Internet sources have become available," says Jon Osborn, manager of auto sales research at J.D. Power and Associates, Agoura Hills, Calif. "For years only 11 percent of new vehicle buyers had

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Americans skeptical of newer vaccinations

Although most adults believe that traditional childhood vaccinations are safe and effective, a study by CDB Research & Consulting Inc., New York, found that their faith wavers when it comes to newer vaccinations.

Awareness of available vaccinations does not appear to increase consumers' trust in the medications. For example, while 85 percent of adults are familiar with the influenza vaccine, only 62 percent of them believe the vaccination to be effective in preventing the onset of the flu. Similarly, only 68 percent of adults feel that the vaccination is safe.

The overall awareness of vaccinations dramatically decreases with more unusual illnesses. Even advertising dollars don't help. For example, only half of the adults surveyed know of the existence of vaccinations for hepatitis A, even though SmithKline Beecham, makers of Havrix, the hepatitis A vaccine, has spent $12.6 million advertising to consumers since 1995, according to Competitive Media Reporting.

The awareness level is similarly low for hepatitis B and pneumonia (53 percent hepatitis A, 54 percent hepatitis B, 49 percent pneumonia). These adults are also more likely to doubt the safety and efficacy of the vaccinations for these less common illnesses (hepatitis A: 52 percent believe effective, 54 percent believe safe; hepatitis B: 54 percent believe effective, 56 percent believe safe; pneumonia: 60 percent believe effective, 64 percent believe safe).

Far more faith is extended to traditional childhood vaccinations (polio: 79 percent believe effective, 78 percent believe safe; tetanus: 82 percent believe effective, 77 percent believe safe; diphtheria: 74 percent believe effective, 73 percent believe safe; tuberculosis: 64 percent believe effective, 63 percent believe safe).

When questioned about the development of future vaccinations for AIDS or cancer, the majority of adults are skeptical about the possibility of creating a vaccine that is both safe to administer and effective in preventing either disease (AIDS: 64 percent not effective, 61 percent not safe; cancer: 65 percent not effective, 58 percent not safe).

Despite this apparent disbelief in the power of vaccinations, doctors continue to recommend various vaccines, particularly to their male patients over the age of 55. For instance, during their last three doctor visits, more men than women discussed vaccinations (42 percent men vs. 30 percent women). The majority (52 percent) of these adults are 55+ and live in households without children (40 percent). For more information call 212-367-6866.

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Product & Service Update

New CATI/CAPI software

Heskes & Partners, Amsterdam, The Netherlands, has introduced new CAPI and CATI software, IT, consisting of five modules. The new Windows version of the interviewer module, Dmaker for Windows, makes it possible to include multimedia elements in an interview (e.g., radio/TV commercials). Demo versions of IT and of the new module IT Dmaker for Windows are available at http://www.xs4all.nl/~heskes/it.html. For more information call Sjoerd Heskes at 00-31-20-620-5859. Fax 00-31-20-625-3258.

New benchmark measures competitiveness

Competitive Benchmarking Associates, a division of Branham Marketing Strategies, Houston, has developed its own research instrument, the Competitive Strength Inventory, to measure the levels of competitiveness, customer loyalty and marketing effectiveness for all competitors providing a product or service to a given target market. For more information contact Michael Branham at 281-364-8299 or at branham@flash.net, or visit the company's Web site at http://www.flash.net/~branham.

Report profiles African-Americans

DataDeeds, Inc., a Silver Spring, Md., firm specializing in the African-American market, has released "The Black Report," a detailed statistical profile of African-Americans and their future prospects. The report was written by Billy Tidwell, former director of research for the National Urban League and cur-

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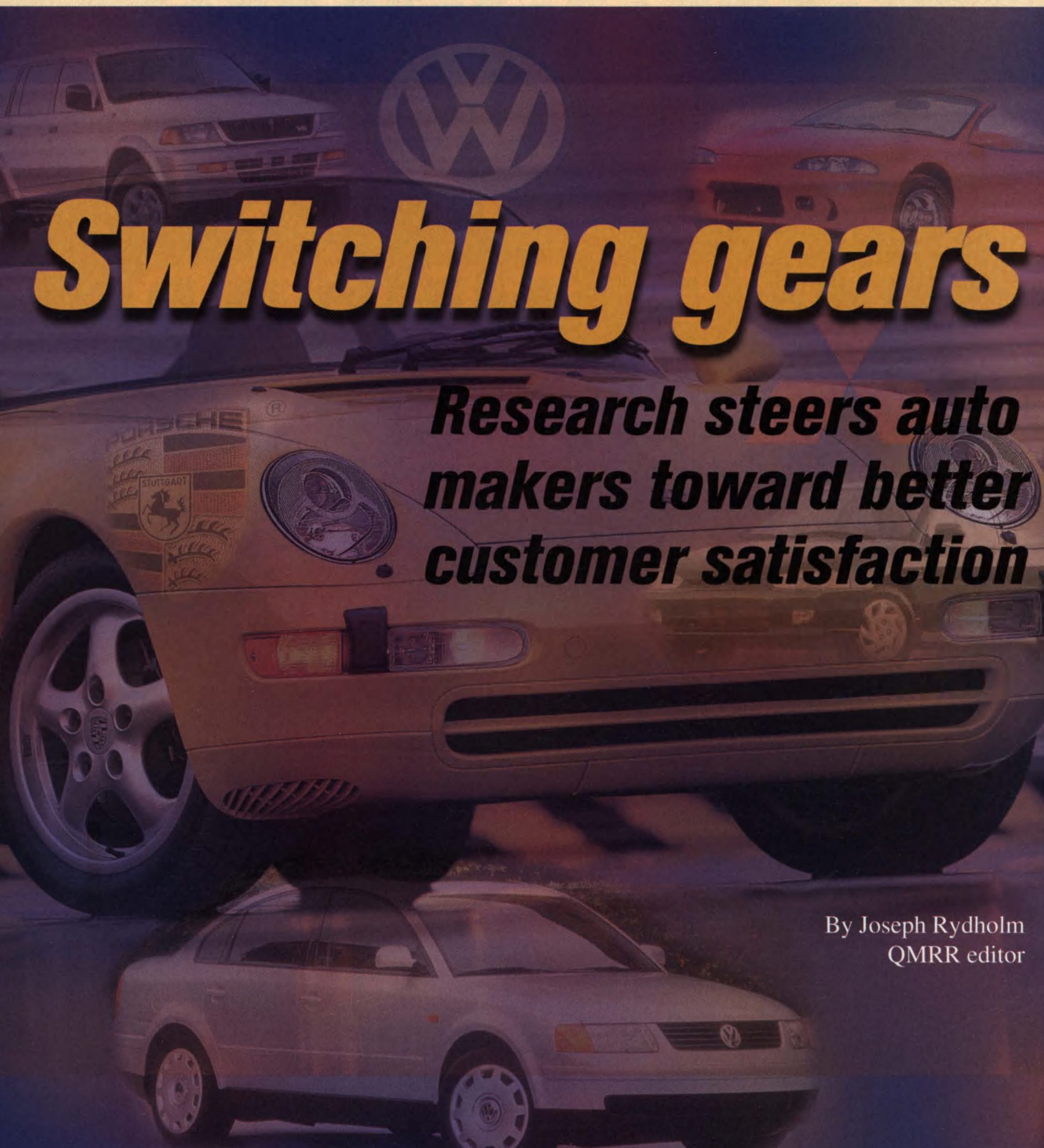
Research Calendar

SENSORY EVALUATION SEMINARS: Tragon Corp., a Redwood City, Calif., research and sensory evaluation firm, has scheduled a series of seminars called "Issues in Sensory Evaluation." Topics and dates include: Quality Control and Stability Testing (November 3-5); Principles of Sensory Evaluation (March 2-4, 1998); and Descriptive Analysis (May 4-6, 1998). For more information contact Julie Olson at 650-365-1833 or by fax at 650-365-3737.

INSURANCE INDUSTRY WORKSHOPS: Saporito & Associates, a New York insurance industry research and consulting firm, has announced its fall Insurance Industry Workshop Series. Topics and dates include: Competitive Intelligence in the Insurance Industry (October 16); and Secondary Market Research on the Insurance Industry (November 19). For more information contact Pat Saporito at 212-227-8575 or at saporito@brainlink.com.

INSURANCE RESEARCH ANNUAL CONFERENCE: The Society for Insurance Research annual conference on November 5-7 at the Embassy Suites Resort in Orlando, Fla., will focus on technology and how it is changing the insurance industry. The keynote speaker is William Hartnett, worldwide insurance manager for Microsoft. Session topics include: the use of the Internet in primary research; the next generation of search engines; and the virtual insurance company. Concurrent with the conference will be workshops on data warehousing/data mining and competitive intelligence. For more information call 770-426-9270.



Switching gears

Research steers auto makers toward better customer satisfaction

By Joseph Rydholm
QMRR editor

Customer satisfaction

Though it's still a staple of many auto industry customer satisfaction efforts, the paper survey is slowly being replaced. While written surveys are usually in expensive, they lack immediacy (an unsatisfied customer may stew for weeks or months before a company responds to their complaint), they typically earn low response rates, and they're open to misuse. Stories abound of salespeople practically filling out survey forms for their customers to ensure they score well and avoid the punishment that often accompanies a poor evaluation.

In light of these drawbacks, many car makers have turned to the telephone as their preferred satisfaction research vehicle. Telephone interviews earn a better response rate, are timelier and provide dealers and manufacturers a steady diet of that magical elixir so prized by satisfaction gurus: the voice of the customer.

Dan Girard, retail sales support manager, Mitsubishi Motor Sales of America, Cyprus, Calif., says that the company switched several years ago from paper surveys to telephone surveys conducted by Sky Alland Marketing, Columbia, Md. "We found out two things from the paper survey: you don't get the response rate that you want, and it's pretty impersonal. With the telephone approach, we're able to contact about 75 percent of our customers. Surprisingly, we have a less than 1 percent refusal. And we're getting very good information directly from the customer; we know that their replies are not being coached in any way. It also gives us a chance to thank them for their purchase. The dealer already does that but we think it's important for us as a manufacturer to do it and get the relationship started on a positive note."

Telephone research also offers greater immediacy, says Joe Tate, team leader for Customer Care Strategies, Volkswagen of America, Auburn Hills, Mich., also a Sky Alland client. "Mail can be effective in giving you more detail, but it doesn't allow you to respond quickly to customer issues. We wanted to have a more responsive system to hear the voice of the customer more clearly and at a higher volume. Once we saw the benefits we went to telephone and the results have been much more to our expectations. With Sky Alland we get a 70 percent complete rate versus a 20-30 percent response with mail."

George Cabanting, manager, customer commitment, Porsche Cars North America Inc., Reno, Nev., says that his firm also experienced low response rates with its paper surveys, which is one reason Porsche now uses the services of Sky Alland Marketing. "We found early on that our clientele were not predisposed to filling out surveys. We did a lot of work to make the responding process, by paper or mail, easier. We had a toll-free fax number, a prepaid envelope. We did everything to help a customer to respond, yet we still did not get high response rates."

Low response rates fuel dealer perceptions that the paper

> ***"Car dealers are as skeptical as anyone in retailing. If the mail results weren't to their liking they'd say that we used a bad sample. With the telephone, we have a census; we're not just getting responses from the really angry or the really happy customers. With the phone research, we can say to the dealers, these are the voices of your customers telling you what you're doing right and what you're doing wrong so let's talk about your processes and not the sample."***

surveys aren't representative, a belief that's voiced especially if the dealership scores poorly. Phone research nullifies those criticisms. "Car dealers are as skeptical as anyone in retailing," Tate says. "If the mail results weren't to their liking they'd say that we used a bad sample. With the telephone, we have a census; we're not just getting responses from the

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An integrated approach

Technology firm conducts worldwide customer satisfaction survey via E-mail, Internet

By Jim Slevin and John Chisholm

Editor's note: Jim Slevin is manager of field quality engineering at Advanced Micro Devices, a supplier of integrated circuits based in Sunnyvale, Calif. He can be reached at jim.slevin@amd.com. John Chisholm is president of CustomerSat.com, a Menlo Park, Calif., customer satisfaction measurement and market research firm. He can be reached at jchisholm@CustomerSat.com.

Advanced Micro Devices (AMD) is a global supplier of integrated circuits for the personal and networked computer and communications markets. AMD produces processors, flash memories, programmable logic devices, and products for communications and networking applications. Founded in 1969 and based in Sunnyvale, Calif., AMD had revenues of $2 billion in 1996.

Prior to 1997, AMD had for many years conducted its annual customer satisfaction, loyalty, and value survey of over 200 of its largest customers through face-to-face and phone interviews and postal and fax questionnaires. In search of a more streamlined approach for its 1997 survey, and to make providing feedback more convenient for its customers, the company turned to CustomerSat.com, a Menlo Park, Calif., firm specializing in measuring customer satisfaction and conducting market research using E-mail and the Web.

The result was, to the best of our knowledge, the first annual, worldwide customer satisfaction survey by a Fortune 500 company whose using the Internet as its primary medium.

Why the Internet?

The Internet offers many advantages for customer satisfaction measurement (CSM). Survey results are typically available in a few weeks, with early results available in days or even hours. Customers can complete questionnaires whenever they choose from wherever they choose. Keyboard, mouse, and computer screen make answering surveys easier than handwriting responses, especially open-ended ones, and faster than being read a questionnaire over the phone. Additionally, human interviewer influences that can bias responses are eliminated. Finally, the costs of Internet survey deployment, response tabulation, and capturing verbatim open-ended responses are lower than conventional interviews.

For AMD, the key issue was how many of its customers would be able to respond to an Internet survey. Before all else, Internet-based CSM requires that the customers who have access to the Internet are representative of all of a business' customers. More and more industries are meeting this requirement. In software, computers, networking, technical publishing, semiconductors, and graduate education, using the Internet for CSM and other survey research already is, or is rapidly becoming, feasible. For Internet-based businesses and services, such as securities trading, information retrieval, on-line gaming/entertainment, and other on-line services, customer access to the Internet is implicit. For internal customer surveys, where many or all of an organization's employees share a corporate E-mail system, an Intranet survey is practical even if workers have no access to the external Internet. But Internet-based CSM is still several years away from being practical for most mainstream, non-computer-oriented consumer products and services.

Because AMD's customers are almost exclusively involved in the manufacture of electronic equipment, we believed that most of them had Internet access. Consultation with AMD's field sales organization confirmed that a list of E-mail addresses for most of AMD's largest customers could be assembled from various corporate databases. E-mail addresses for other customers, if required, would have to be collected by phone or fax.

E-mail or Web?

The next major question was whether to conduct the worldwide survey using E-mail or the Web. Each approach has advantages and limitations. E-mail surveys use pure text (ASCII) to represent questionnaires, and can be received and responded to by anyone with an Internet address, whether or not they have access to the Web. Respondents edit the messages, typing in characters at designated places to answer either closed-ended or open-ended questions, and click on "reply." Respondents don't have to be connected to the Internet while completing the survey; they may download the message into a laptop and complete the survey off-line.

E-mail surveys also have limitations. The limited intelligence of ASCII text cannot keep a respondent from, say, choosing both "yes" and "no" to a question where only one response is meaningful. Responses cannot be validated until the completed survey has been E-mailed back and received by the surveyor, which may be hours after the respondent has completed the survey. Skipping instructions (e.g., "If no, go to question 34") must appear explicitly, just as on paper. These factors can reduce the quality of data from an E-mail survey and can require post-collection data cleaning.

A final limitation is that some PC E-mail software products (such as Lotus cc:Mail) limit the length of the body of an E-mail message to 20,000 bytes of text, or anywhere from 30 to 100 questions, depending upon the amount of text in each question. If some AMD customers were using one of these E-mail products, they would not be able to receive and respond to an AMD E-mail survey if it exceeded the 20,000-byte limit.

Web advantages

In contrast to E-mail surveys, Web surveys use hypertext markup language (HTML), the language of the Web, and are posted on a Web site. Web surveys have several advantages over E-mail surveys. First, radio buttons, check boxes, and data entry fields, which are possible in HTML but not in ASCII text, keep respondents from selecting more than one choice where only one is meaningful, and from otherwise typing where no response is intended by the surveyor. Second, skipping can be performed automatically and implicitly based on a respondent's answers, rather than having to be spelled out as instructions to the respondent. Third, responses may be validated as they are entered. Finally, additional survey elements, such as graphics, images, animations, and links to other Web pages may be integrated into or around the survey. These factors make completing the survey faster and more interesting, and result in higher quality data.

For survey research to be meaningful, surveyors must be able to control the pool from which respondents are selected, and ensure that respondents do not respond multiple times ("stuff the ballot box"). These requirements are met by E-mail surveys, whose distribution is controlled by surveyors and which can be encoded, if desired, to associate returned responses with their corresponding outbound E-mailings. To accomplish the same with Web surveys, E-mail invitations are used. E-mail messages containing the Web address (Uniform Resource Locator or URL, usually in the form http://www.company.com/etc.) of the survey page are sent to respondents, who either click on the URL, or copy and paste it into their Web browser, to view the survey page. When used with E-mail invitations, a Web survey is best posted in a hidden location on the Web, so that

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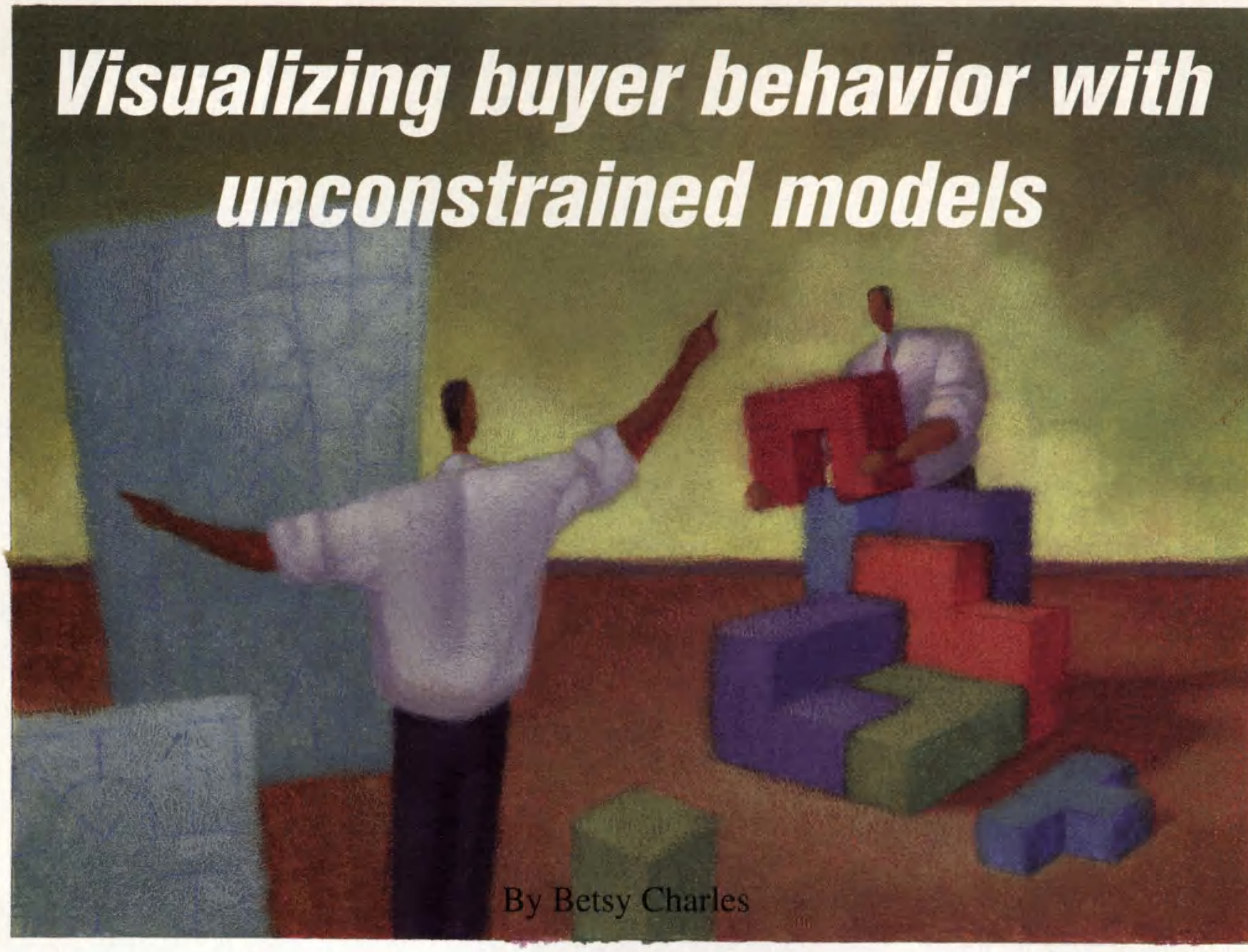
Data Use

Visualizing buyer behavior with unconstrained models



By Betsy Charles

Editor's note: Betsy Charles is an account manager and senior research analyst at The Dieringer Research Group, Inc., Milwaukee, Wis.

Modeling buying behavior by measuring customer satisfaction brings to mind the story about the blind men describing an elephant. Each one made an accurate assumption based on limited knowledge but drew the wrong conclusion.

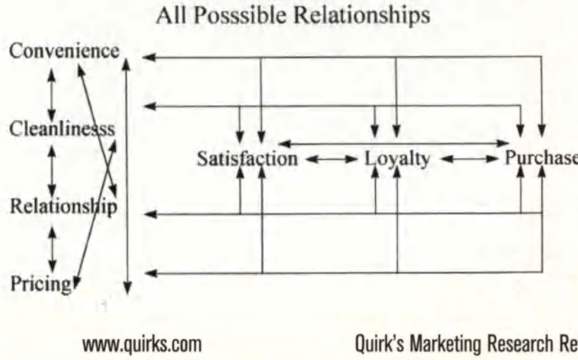
Based upon limited knowledge, marketing researchers blindly assume that customer satisfaction is necessary for loyalty and that loyalty is necessary for repeat purchase. This hierarchical assumption is inaccurate because factors may directly influence repeat purchase without funneling from customer satisfaction through loyalty to repeat purchase. In fact, repeat purchase is not necessarily contingent upon customer satisfaction and loyalty. For example, do you repeatedly buy lunch at a nearby deli even though you are so dissatisfied with the deli that you refer your colleagues to other restaurants? In this example, convenience directly influences repeat purchase, rather than directly funneling through customer satisfaction and loyalty. Thus the hierarchical assumption can bias results because it ignores direct influences on buyer behavior.

The bias inherent in assumptions is avoided by using unconstrained models — algorithms that make no assumptions and have no requirements about causality. In contrast to unconstrained models, constrained models either assume causality or confirm causality only if the requirements of concomitant variation, a time lag, and the logical elimination of all other possible causal factors are met.

Unconstrained models

Unconstrained models include causal modeling, path analysis, latent structure analysis, structural equation modeling, LISREL, and AMOS. Unconstrained models assume that all factors could be influenced by other factors and thus

Figure I
All Posssible Relationships



are endogenous. As a heuristic device, unconstrained models hypothesize nonrecursive (or reciprocal) linkages between all possible factors that could impact the outcome. Figure 1 shows how unconstrained models represent both directions of causality using arrows and feedback loops.

All possible relationships

The arrows in Figure 1 convert to a system of equations in which each factor (X_i) is measurable, each weight (P_{ij}) is the unknown path coefficient of a factor, and each error term (R_i) is the residual for the equation. Each equation in the system is similar to a regression equation, but without the intercept.

$$X_i = P_{ij} X_i + P_{ij} X_i + . . R_i$$

Confirmed relationships

The system of equations is solved through an iterative process using multiple regression until a stable solution is obtained. When the number of equations is greater than the number of unknowns, divergent solutions may occur. If this occurs, substituting extra equations into the initial system of equations identifies the best solution. Solving for path coefficients derives the direction of each factor's impact on the endogenous variable. After standardizing the regression coefficient (beta weight), each factor's impact can be compared relative to the impact of other factors. If the impact of a factor is zero or negligible, the relevant arrow is deleted from

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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. He can be reached at 818-782-4252 or at artshulman@aol.com.

Dave McKamey of Western WATS recalls a political sur-vey his company conducted last year in Texas. Dialing randomly generated numbers, one of the interviewers reached a man who seemed very disturbed that he had been called. The man bellowed, "Do you have any idea who you have called? Do you realize you have called me on the Red Phone? The RED PHONE! Only the President of the United States calls me on the Red Phone!"

Apparently the man was a general, whose number was randomly selected. The conscientious interviewer continued, "I appreciate that, sir, but do you want to do the survey anyway? Your opinion counts too."

The man replied, "No, but I'll call the FBI if you ever call me again!"

Some respondents, bless their hearts, are exceptionally polite, to the extent of being reluctant to ever interrupt the interviewer. I was reminded of this when monitoring a recent study. The interviewer asked, "Which of the following groups best describes your total household income?" She proceeded to read all the income categories — under $20,000, $20,000 to $29,999, $30,000 to $39,999, and so on. It was only after she'd finished reading the final of nine alternatives — $150,000 and over — that the respondent said, "The first one you read, under $20,000."

Ron Sellers of Ellison Research reports attending a focus group in Phoenix where Chinese food was served to the clients. The head of advertising for a major bank was enjoying his meal immensely, until he sensed something unusual about the crunchiness of the fried rice, and pulled a cricket leg out of his mouth. Needless to say dinner ended prematurely. They didn't explore what might have happened to the rest of the cricket.

Beth Mattar of Motorsearch was conducting a large-scale automotive clinic in a distant city and hired local people to staff the clinic. On the first day of training, they went through a detailed orientation for the 60-some people who filled the various clinic positions. For an hour and a half, Mattar presented the study objectives, individual job descriptions, rules and regulations, etc. This was followed by a 30-minute question and answer period. Next they split everyone up into their specific groups to provide further detail on their individual job responsibilities.

Everyone was paired with a supervisor except for one elderly man with a quizzical look on his face and a piece of paper clutched in his hand. "I think there's been a mistake," he said quietly, passing the invitation to Mattar. Glancing at the invitation, which bore the next day's date, Mattar quickly realized what had happened: the man had come at the right time, just a day early!

She gave him his $50 incentive check, thanked him and sent him home.

Murray Simon of D/R/S Health Care Consultants says that as a health care marketing researcher, he sometimes finds himself in the position of having to explain to his clients something technical that was said during a focus group or individual interview. This particular task was made rather difficult one night during a focus group with surgeons on the subject of prostate cancer.

One of the respondents was Hispanic and although he was very articulate, he spoke with a heavy accent and used Spanish colloquialisms quite freely. At one point he made the statement, "When you cut off their *cojones*, they are not too happy about it."

During the debrief after the group, one of Simon's clients, a young woman, asked if he would explain the technical medical term used by one of the doctors...and here she checked her notes... "carrones or collonies."

Simon reports that some technical explanations are easier than others.

Susan Meyer, whose company, National Shopping Service, performs mystery shopping, reports two more reasons her shoppers have given for not completing their shops:

"There's a tornado watch right now."

"It's 25 degrees below zero and the policeman told me I'd best go home."

In future issues, we'll report on more quirky, loopy and strange happenings in the world of market research. If you'd like your story to be told — anything related to research is usable, from spilling soup on your client's new suit to cute answers respondents provide on questionnaires — please call me at 818-782-4252 or, better yet, write it up and fax it to me at 818-782-3014 or E-mail me at artshulman@aol.com. ❑

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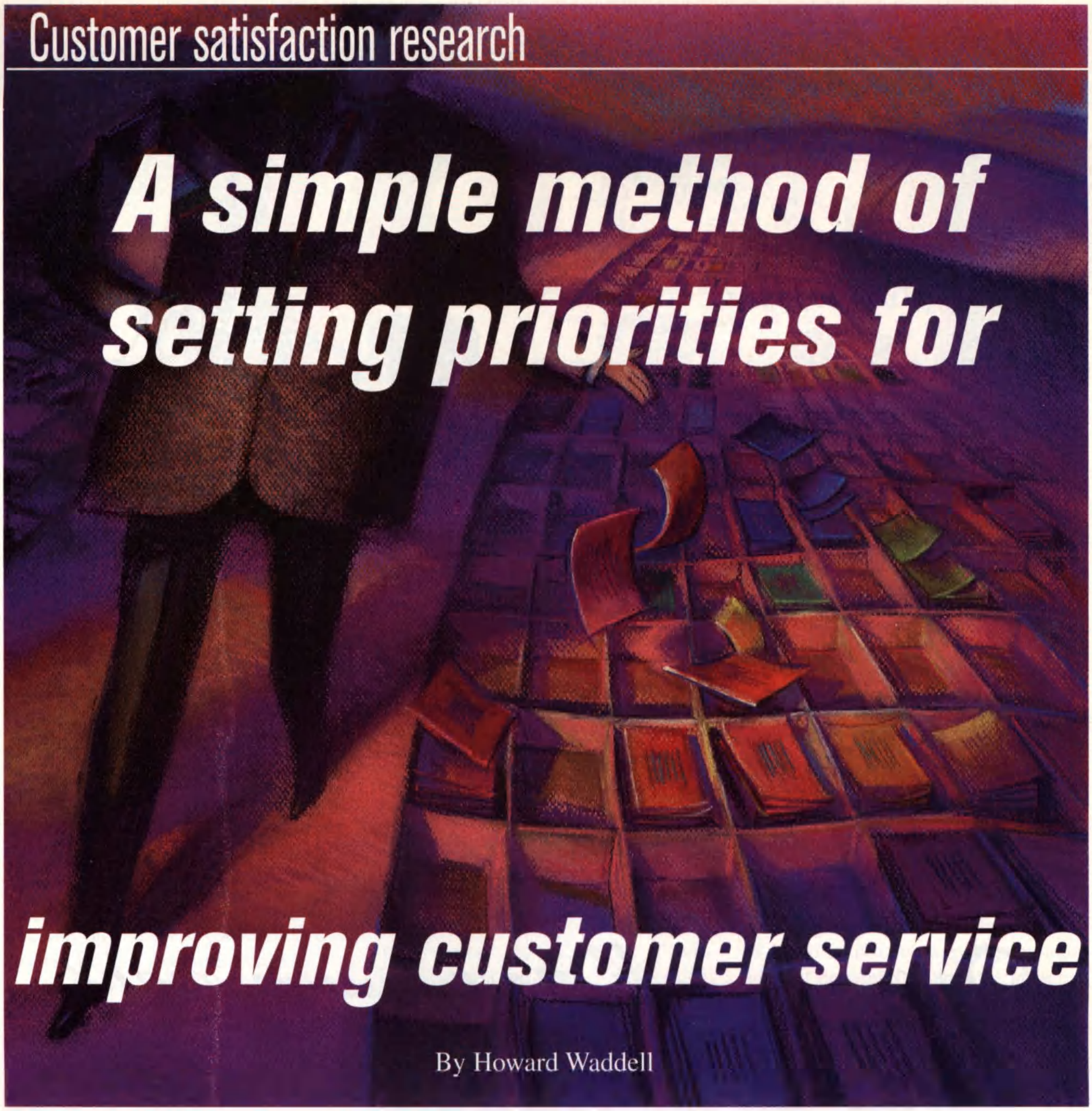
A simple method of setting priorities for improving customer service



By Howard Waddell

Editor's note: Howard Waddell is president of Decision Resource, Inc., Miami. He can be reached at 305-666-0476.

A survey of an organization's customers might reveal a number of individual product or service elements that are in some way deficient. If that is the case, then management must decide which of these elements to address first. One approach is to try to fix the things that customers say are most in need of fixing as indicated by low performance or rating scores. However, some of the weakest elements may not be among those most important to the customer.

A simple solution to this problem would be to ask the customers how important each of the various product and service elements is. Unfortunately, a too-common response is that everything is important. Consequently, the problem isn't solved.

In this article, we will explore a fairly straightforward way of determining the elements that have the greatest impact on overall customer satisfaction. From this it is a short step to setting priorities for action.

During the spring of 1997, our company, Decision Resource, conducted a mail survey of investors with a net worth of $1 million or more. One of the primary objectives of the survey was to determine the individual service elements that were most closely correlated with overall customer satisfaction and, of these, which ones were most in need of improvement.

Altogether, 225 questionnaires were mailed to people (mostly men) in households with a net worth of at least $1 million. Of these questionnaires, 97 (or 43 percent) were completed and returned. The statistical information which follows is based on these responses.

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Walter Baric has joined *InterActive Research Corp.*, Atlanta, as senior vice president of research services. **J. Edward Brunson, Jr.**, as also joined the firm as vice president, client services.

Aaron Grossman, a senior vice president and partner at *Newman-Stein*, has been elected president of the New York American Marketing Association for 1997-98.

Grossman **Fuller**

H. Grace Fuller, president of *Fuller Research Services, Inc.*, has been elected to the Marketing Research Association's 14-member board of directors.

Chris Crouch has been named vice president of information systems at *Decision Analyst, Inc.*, Arlington, Texas. Crouch has also been appointed to the company's board of directors. In addition, **Sue Chang** has been named vice president, director of econometrics, and **Elisa Sylvester** and **Jamie Winters** have been named account executive.

Interviewing Service of America, Van Nuys, Calif., has added **Jim Nyland** to its New York office as director of data processing services. In addition **Lopy Williams** has been named manager and **Kelly Simmons** associate manager of the company's new telephone facility in Alhambra, Calif.

DataStar, inc., Waltham, Mass., has added **Barbara Contardo** as director of sales and marketing.

Aragon Consulting Group, St. Louis, has named **Sharon Thompson** new business development coordinator and **Lynn Moore** manager of new business development. In addition, **Cynthia Joyner** has been promoted to senior research analyst and **Kris Dunn** has been promoted to project manager. **Marcela Williams**, a senior at the University of Missouri - St. Louis, is interning at the firm.

Walker Information, Indianapolis, has announced the following promotions: **Kimberly Graham Lee** to group vice president, global marketing and sales; **Randy Shoemaker** to group vice president, operations; **Stephanie Young-Helou** to vice president, marketing sciences; **Kathy McCarty** to group vice president, business innovation team; **B.J. Kyzr-Sheeley** to group vice president, North American client service. In addition, **Brian Kovacs** has been named vice president, information technology, and **Bill Easton** has been named vice president, business innovation.

The Matrix Group, Lexington, Ky., has added three new staff members: **Rob Hanak** has been named data services coordinator; **Tanya Johnson** has been named human resource coordinator; and **Teri Willis** has been named research analyst.

Nancy Deck has been named president of *Claritas Inc.*, Arlington, Va.

Robert Kaiser has been named vice president, client & analytical services, at *The Research Spectrum*, San Francisco.

John Cucka has joined the Chicago office of Atlanta-based *Elrick & Lavidge* as manager, marketing sciences. In addition, at the Atlanta office, **Tom Welander** has been named marketing sciences analyst and **Mike Lange** has been named vice president - technology development.

C.J. Olson Market Research, Inc. has named **Charles Stanek** data processing manager. In addition, **Gina Baas** has been named data collection manager.

Lynn Hibben has joined *Quality Controlled Services* as a branch manager in the QCS Dallas office.

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Research Industry News

Aspen Research, Coral Gables, Fla., has a new Web site at http://www.aspen-research.com.

MaryAnn Friedlander, formerly with Nestlé, has opened Complete Research Solutions at 2579 Warrensville Center Road, Cleveland, Ohio, 44118. Phone 216-321-5078. Fax 216-321-5078.

Data analysis software maker **SPSS Inc.**, Chicago, has agreed to purchase **Quantime Ltd.**, a UK-based research software and services supplier. The transaction is expected to be completed as a pooling of interests in which SPSS will issue 900,000 shares of its common stock. At press time in September, the parties expected to conclude the transaction, subject to the completion of definitive documentation, by September 30. SPSS plans to continue developing and marketing Quantime products.

Adapt, Inc., Minnetonka, Minn., has added tape transcription to the list of data processing services it offers. For more information call Dave Koch at 888-52ADAPT.

RDA Group, a Bloomfield Hills, Mich., research firm, received Ford's 1996 Excellence in Marketing Award for its contributions in the areas of developing a global quality research system, specific quality audit projects in South America, its ongoing evaluation of U.S. and European customer assistance centers, and determining consumer wants and needs for vehicle security systems on four continents.

Juanita Gore has sold her Evansville, Ind., research firm, Gore Research, to James Knauff. The new firm will be known as **Gore/Knauff Research & Associates**. New phone and fax numbers are 812-485-2160 and 812-485-2164, respectively.

New York-based **VNU Marketing Information Services** has completed its acquisition of Equifax National Decision Systems, Atlanta, and sealed a long-term strategic marketing and cross-licensing agreement linking VNU and Equifax for the next 10 years. In other news, VNU has organized the VNU Precision Marketing Group, a new entity comprised of VNU-owned Claritas Inc., Spectra Marketing, and National Decision Systems.

Paradigm Technologies, a Westwood, N.J., research firm, has formed a strategic alliance with Protech India Ltd., a research firm that publishes reports on business and consumer segments in India. As part of the agreement, Paradigm will market Protech's research reports in North America.

Microtab, Inc., has moved to a larger facility at 500 Sun Valley Dr., Unit D-2, Roswell, Ga., 30075. Phone and fax numbers will remain 770-552-7856 and 770-552-7719, respectively.

Market Perceptions, Inc., Denver, has been named agency of record for NEC Computer Systems, Sacramento, Calif. The company will conduct research for NEC on customer satisfaction tracking, new product development, ad testing and tracking, product positioning, technical support satisfaction and buyer behavior.

Integrated Marketing Services, Inc., which includes American Opinion Research, Inc., Environmental Research Associates, Inc., and Infocus, Inc., has moved to 279 Wall St., Research Park, Princeton, N.J.

Research International USA, New York, has restructured its domestic operations. The firm is also opening

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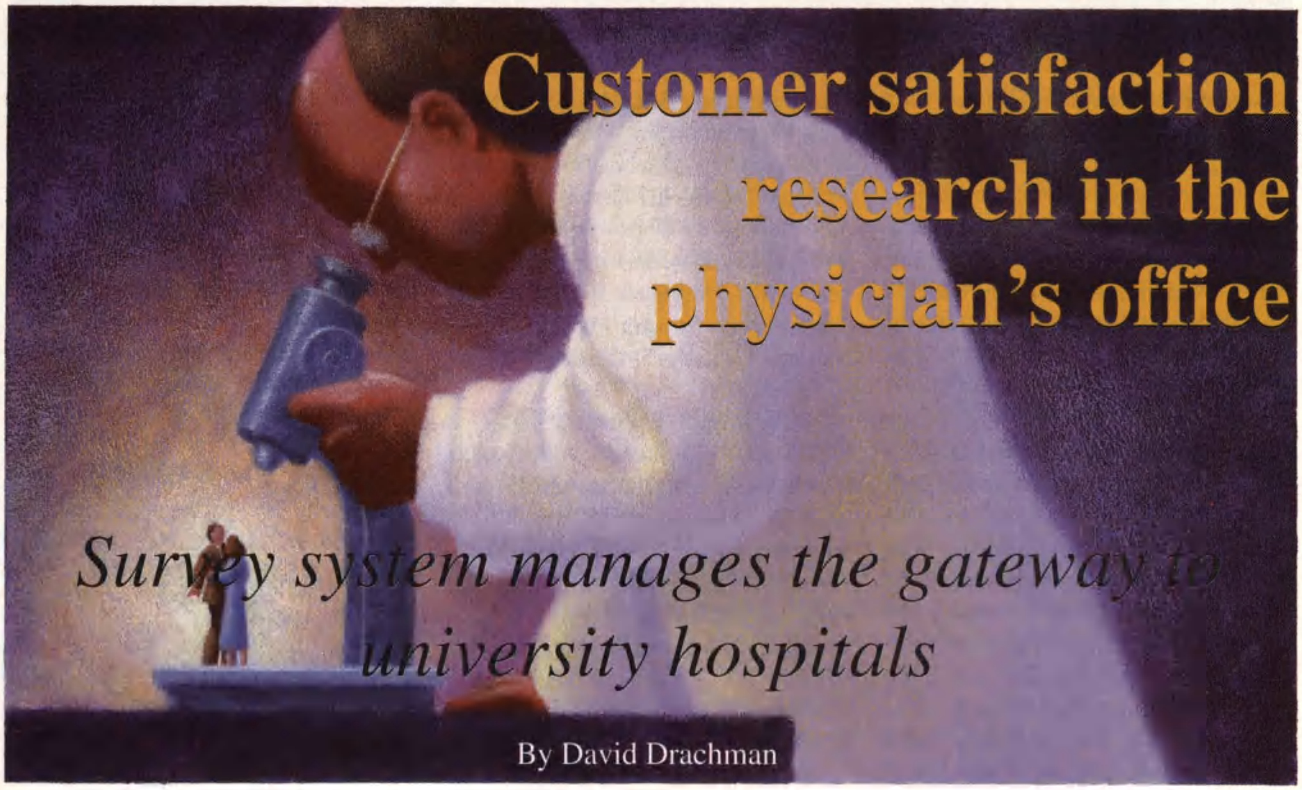


Customer satisfaction research in the physician's office

Survey system manages the gateway to university hospitals

By David Drachman

Editor's note: David Drachman is director, marketing research at University HealthSystem Consortium, Oak Brook, Ill. He can be reached at drachman@msgate.uhc.edu or at 630-954-2432.

The culture of customer-focused service came late to the health care industry, and later still to university hospitals. The specialist and subspecialist physicians who predominated at these institutions were accustomed to waiting for referrals from primary care doctors, and the administrators of these institutions felt that the position of academic health centers as premier teaching and research facilities would guarantee that such referrals would continue unabated.

However, rising health care costs, the explosive growth of managed care plans, the increased purchasing power of local business coalitions, and declines in Medicare and Medicaid reimbursement have changed all that. Academic health centers (AHCs) found themselves competing head-to-head for referrals with nearby community hospitals while still trying to finance their teaching and research missions. In some markets, AHCs began to lose major insurance contracts to community hospitals that are unencumbered by teaching and research overhead. As a leader of one business coalition remarked at a meeting with staff at an AHC, "We know you have to train new doctors; we just don't want to have to pay for it."

Administrators at AHCs suddenly realized that referrals from primary care physicians were a vital gateway to their institutions that could no longer be taken for granted. To protect and expand this gateway, these AHCs began to aggressively recruit more primary care physicians in order to generate their own referrals to staff specialists. Even an extensive network of primary care physician offices does not guarantee success, however. To keep the waiting rooms filled, it is essential to systematically monitor the office outpatients' perceptions of their experiences.

This article describes one such monitoring system implemented by the University HealthSystem Consortium (UHC), an alliance of 78 AHCs. This monitoring system used a standardized mail questionnaire to measure satisfaction with key aspects of the outpatient visit, identify benchmarks for excellent

Participating Institutions

- University Hospital of Arkansas
- Bowman Gray/Baptist Hospital Medical Center
- Medical Center at UCSF
- The University of Connecticut Health System, John Dempsey Hospital
- University Medical Center of Eastern Carolina University
- Froedtert Memorial Lutheran Hospital
- Hermann Hospital at the University of Texas Health Science Center
- University of Kansas Hospital
- University of Kentucky Hospital
- University of Massachusetts Medical Center
- University of North Carolina Hospitals
- University of Tennessee-Bowld Hospital
- University of Virginia Health Sciences Center
- University of Washington Medical Center
- University of Wisconsin Hospital and Clinics

performance, and pinpoint patient hot buttons that are crucial to the overall office visit experience. Primary care physician offices at 15 UHC member institutions participated in the project.

Data collection

A random sample of patients who had visited primary care clinics during January 1997 received a questionnaire in the mail after their visits. The questionnaire, designed and pilot tested by the Picker Institute in Boston, asked patients to report on 16 key aspects of their office visit experience, and to rate their overall satisfaction with the visit. These aspects are listed below:

- ease in obtaining an appointment;
- length of waiting time in waiting room;
- length of waiting time in examination room;
- provider's attentiveness to patient;
- clarity of provider's answers to patient's questions;
- ease with which provider inspired confidence and trust;
- respectful treatment of patient;
- provider's involvement of patient in care decisions;
- provider's explanation of what to do if symptoms continued;
- explanation of medication's side effects;
- sufficiency of information given patient;
- length of time spent with provider;
- explanation of how patient would learn about test results;
- explanation of test results to patient;
- provider's adequacy in addressing patient's main reason for visit; and
- organization of the office.

To achieve an adequate rate of response, a three-wave mailing was conducted. Ten days after the initial mailing, all potential respondents received a reminder postcard. This post card was followed by a second mailing of the survey questionnaire to all patients who had not returned their surveys. A total of 2,455 patients responded, representing 49 percent of eligible and reachable respondents. Response rates at the individual institutions ranged from 37 percent to 53 percent.

Problems with care

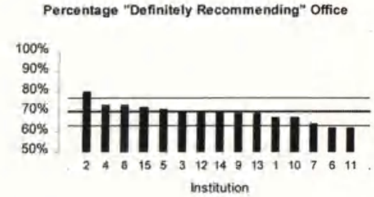
A problem score was computed for each patient who responded to the survey. Each aspect of care listed above was classified as a problem if the behavior in question was not performed or was only partially performed. For each patient then, a problem score ranging from zero to 16 was computed.

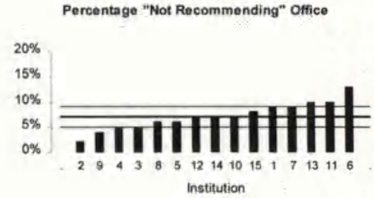
Across all participating institutions, an average of three problems per patient was reported. This represents almost 20 percent of the potential problem areas assessed. The most frequent sources of problem reports were:

- length of waiting time in examination room; problems reported by 28 percent of patients;
- sufficiency of information given to patient; problems reported by 28 percent of patients; and
- organization of the office; problems reported by 27 percent of patients.

Identifying benchmarks for patient satisfaction

The participating institutions were coded with the numbers one through 15. Patient satisfaction varied substantially across the participating institutions for each of the survey items as well as for overall satisfaction. For example, the last item on the survey asked the patients if they would recommend the office to others. There were three possible response categories: "yes, definitely," "yes, probably," and "no." Across institutions, the percentage of patients responding "yes, definitely" varied from 80 percent to 62 percent while the percentage of patients responding "no" varied from 2 percent to 13 percent.





For each item on the survey, statistical process control (SPC) analyses identified several institutions that signifi-

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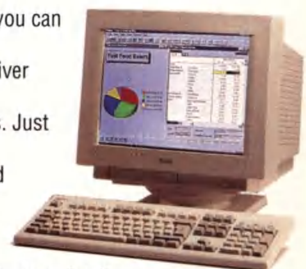

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cantly outperformed the averages (Spoeri, 1991). These benchmark institutions were targeted for follow-up site visits and conference calls to uncover the factors that appeared to explain their superior performance in satisfying patients.

What really matters to office outpatients?

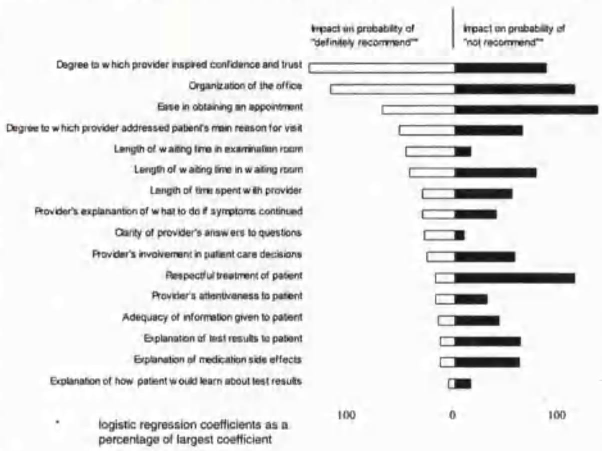
One goal of the project was to identify the customer hot buttons that were crucial in forming their impressions of the services received during the office visit. A common strategy for pinpointing customer hot buttons is to relate satisfaction scores on individual survey items to a measure of overall satisfaction with the service encounter. However, this relationship is not necessarily linear, as recent research in patient satisfaction (for example, Mittal and Baldasare, 1996) has shown.

On some attributes of service ("dissatisfiers"), an unsatisfactory experience is crucial to forming a negative impression, whereas a substandard experience on the same attribute may have little impact on the formation of a positive impression. For example, in the physician office setting a failure to clearly explain test results may help foster a negative impression of the visit, but a clear explanation of test results may not add much to a positive impression.

Conversely, on other attributes ("satisfiers"), an above average experience leads to a positive impression but a substandard experience may not add much to a negative impression. Finally, in some cases, the same attribute may be both a satisfier and dissatisfier, in which case the relationship is approximately linear.

In order to identify satisfiers, a logistic regression procedure was used to model the probability that a patient would "yes, definitely" recommend the office to family and friends, based on the patient's responses to the 16 survey items. In order to identify dissatisfiers, a separate model was constructed for the probability that a patient would not recommend ("no") the office to family and friends.

The results showed that the degree to which the provider inspired confidence and trust and the organization of the office played a strong role in both satisfaction and dissatisfaction. On the other hand, ease in obtaining an appointment and the degree of respectful treatment of the patient are primarily dissatisfiers: a problem in these areas increases the probability of not recommending the office to others, but a lack of problems in these areas does little to increase the probability of a definite recommendation. Finally, length of waiting time in examination room and clarity of provider's answers to the patient's questions were satisfiers, playing a greater role in satisfaction than dissatisfaction.



From data to action

By providing comparative data from 15 peer institutions, the survey results gave the participating institutions an external frame of reference for assessing their success in satisfying their patients. Without such an external yardstick, it would have been very difficult for office administrators and staff to know what levels of satisfaction represent good or poor performance. The survey results identified institutions two and nine as above-average performers in a number of areas. These institutions were visited to identify the factors critical to their success in achieving high patient satisfaction scores. The factors are listed below.

Critical Success Factors

- Support staff centrally located and cross-trained
- "Urgent care provider" designated for patients wishing to be seen within one or two days
- Expanded hours of operation
- Central access center for patient appointments and information requests
- Prescription refill protocol to reduce the number of calls needing physician attention
- Use of mystery shoppers to improve telephone response times
- Patient reminder calls the day prior to the visit to reduce the no-show rate

The results of the site visits were compiled in a report that was shared with all survey participants. Later this year participants will attend a meeting to discuss the results further and select partners for benchmarking activities.

For each participating institution, a separate analysis of key drivers of patient satisfaction was undertaken. This allows office administrators and staff to budget their satisfaction improvement efforts to those areas most likely to have an impact on the patient satisfaction bottom line.

By identifying better performers and patient satisfaction hot buttons in a systematic and standardized way, the measurement and follow-up system described here has boosted our member institutions' efforts to improve quality in the primary care physician's office, an increasingly vital customer gateway to the academic hospital. ❑

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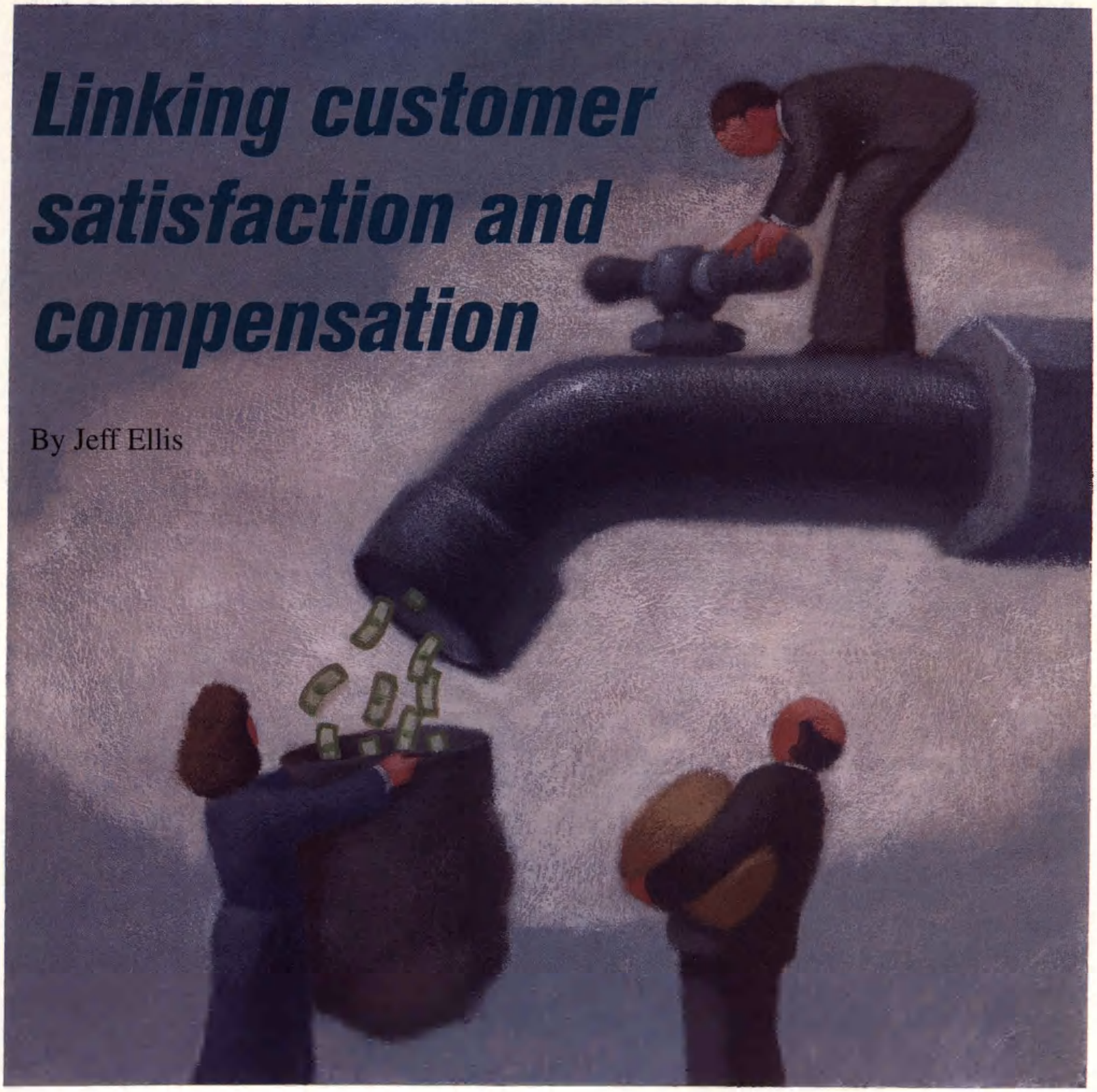
Spoeri, R.K., "The inspection of data." In Longo, D.R., Bohr, D. (eds.): *Quantitative Methods in Quality Management: A Guide for Practitioners*. Chicago: American Hospital Publishing, 1991.



Linking customer satisfaction and compensation

By Jeff Ellis

Editor's note: Jeff Ellis is director, customer value assessment with Maritz Marketing Research, St. Louis.

The issue of how, or even whether, to tie compensation to customer satisfaction results seems straightforward and simple. But in reality, this issue is quite complex with no clear solution. It should be emphasized up front that our company strongly supports reward systems which place positive consequences into the hands (or wallets) of those responsible for some incremental performance. And while it's tempting to categorize reward systems as "do this, get that," the fact is, there are many complex factors which must be accounted for in such a design. A properly designed and successful reward system will meet the following requirements:

• it provides a clear understanding of the objective;
• it effectively translates the objective to the performance plan;
• it is embraced by those affected;
• it is focused on success, rather than failure.

Critical success factor #1: provide a clear understanding of the objective. Sometimes, the wrong objective is trotted out, and forms the basis for compensation. The danger here is that an organization can succeed in paying significant sums of money for performance which meets the criteria of the plan, but does not address corporate objectives. This problem is particularly acute in the area of customer satisfaction.

Frequently companies state an objective like, "raise customer satisfaction." Not only is this a nebulous goal, it does not relate well to the core focus of the business, i.e., to make a profit. Customer satisfaction should be viewed as

a variable component of financial goal attainment. The only reason for a company to invest in measuring and influencing customer satisfaction is to achieve positive business (financial) results. While the components that comprise customer satisfaction will vary by product, service, market, consumer demographics, etc., the presence or absence of customer satisfaction will cause consumers to exhibit positive or negative behaviors. And that — quite literally — is the bottom line.

So the true objective is not "raise customer satisfaction," but to "generate greater profits by influencing the balance between positive and negative customer behavior." The key is in recognizing that customer satisfaction is not the goal, but a contributor to the goal.

Critical success factor #2: effectively translate the objective to the performance plan. This is the area that requires the greatest thought and effort. After properly identifying the objective, all can be lost by failing to design an effective performance plan. The plan must:

• provide goals which are objective and attainable;
• provide rewards which are commensurate with the effort required;
• provide for positive, immediate, and certain consequences;
• account for everyone who influences attainment of the objective; and
• remove obstacles to success
  - company policies or procedures
  - conflicting goals
  - management interference.

As it relates to customer satisfaction and compensation, this list of "plan musts" is impossible to meet unless the sponsoring company understands the difference between customer satisfaction (a desired state of mind among customers) and the numeric indicator of customer satisfaction (customer satisfaction index or CSI). For this understanding to take place, there must be agreement that customer satisfaction is composed of dozens of "moments of truth." Every transaction and interaction a customer has with a business represents an opportunity to influence customer satisfaction, and thus, subsequent behaviors.

The good news is that individual employees, work groups, and operational units can affect customer satisfaction by managing the moments of truth. This is possible because the moments of truth are within the span of employee control. To the extent that employees can manage the moments of truth, they can be held accountable for them. On the other hand, it is unreasonable to expect an employee — any employee — to directly influence a global measure such as a CSI. It is far more logical to measure and reward performance over which the employee has some control. Therefore, it makes the most sense to reward for improvements to the moments of truth, those elements which drive satisfaction, which contribute to positive customer behavior.

Fortunately, if a customer satisfaction study is designed appropriately, the moments of truth are evident in the attributes measured. With very little processing, it's possible for work groups to identify the specific activities they perform which influence the attributes measured in the study. Once the activities are identified, then it's a matter of establishing standards and measurements of performance (internal metrics). There is a tendency to utilize the very visible macro-measure for the purposes of a reward or compensation system, when in fact, the most effective and efficient method is to use the micro-measures (internal metrics). Not only will this provide a more effective reward system, but it also matches up with the customer satisfaction measurement process. A company is better served by placing the emphasis — and the compensation — on internal measures, rather than external measures.

An additional pitfall in the design process is rewarding counterproductive behavior. It's not that unusual for a company to realize that the reward plan benefits everyone but the company. For example, a company might introduce a sales incentive program which rewards employees for selling more of Product A. One quarter later, salespeople are earning maximum incentives, and sales of Product A are up 15 percent. The program looks like a huge success until the company examines the sales for Product B and Product C, which are off sharply during the quarter. The problem? Reward-based programs work;

sometimes too effectively. While rewards will drive behavior, it's up to the company to ensure that the behaviors do not produce unintended results.

Here's a customer service example: Clients complain that when they call, the phone rings and rings before being answered. The solution requires the secretarial and clerical staff to answer each call by the third ring. This mandate is supported by communications aimed at affected employees, with the intent being to emphasize the importance of each call.

The effort is further supported by rewards to the staff based on the number of calls answered by the third ring. The result: percent of calls answered by the third ring skyrocketed from 25 percent to 85 percent.

Everyone is happy — except the clients, because now the number of callers placed on hold (so that the next line can be answered within three rings) has also skyrocketed. Who could have known? Well, the secretaries would have known, which leads to the next critical success factor.

Critical success factor #3: Design the plan so it is embraced by those affected. The best-designed plan will fail to achieve its full potential without ownership of those affected by it. This does not mean the plan must receive 100 percent agreement among participants on the details. It simply means that those who stand to gain the most from the plan are the ones who will ultimately determine whether the company meets its objective. Also, there is a much greater likelihood that potential flaws in the design will be spotted by those closest to the firing line, this includes customers. There's a lot to be gained by including the voice of the customer in the design phase. So, by involving the key stakeholders during the design phase, a company will arrive at a plan that is stronger, and has the stamp of approval from the groups it seeks to involve.

Critical success factor #4: focus on success rather than failure. One strength of basing a reward system on the moments of truth of customer satisfaction is the direct influence employees can have. That is also one of the cautions for such a system. Employees can opt to provide a less than ideal exchange with the customer, especially if they perceive the reward system as punitive rather than rewarding. Although some very high-profile companies have adopted a "take away" structure which puts a percent of salary or bonus at risk, (usually based on customer satisfaction indicators), this can lead to an unpleasant association between punishment (take away) and the philosophy of customer satisfaction. Common sense and our experience in the area of performance improvement yields an "add to" structure. Under this structure, an employee starts with nothing and watches his bank account grow, thanks to providing superior customer focus.

Competition is another subset of the structure that places too much emphasis on failure. Although the business context will dictate the appropriate approach, as it relates to achieving customer satisfaction and influencing customer behavior, there is not much of an argument for rewarding only the top performing employee/group/division. This type of structure sets up a potential "win-lose-lose" situation. The top performers win, but the remainder of employees, customers, and the company are in a less than favorable position. A much better approach is to base compensation on incremental gains over a baseline of performance. That way each employee/group/division competes against prior performance, and as the critical mass moves forward, everyone wins.

Using a CSI as a compensation determinant

Although there are many compelling reasons for a company to focus on internal metrics that link to customer satisfaction, there may be reasons for a company to tie compensation to external indicators of customer satisfaction (CSI). After all, linking consequences to customer satisfaction data sends a powerful message to employees, and rewarding customer satisfaction improvements reinforces customer-focused behaviors.

Certainly there are firms that utilize a CSI to trigger compensation. However, many experts advise that the CSI comprise just one of a blend of measures which determine the level of compensation. In other words, instead of predicating the reward solely on CSI results, a CSI is combined with other measures — such as quality and productivity performance — to create a composite index which determines how large or small the reward. Here are some of the problems associated with using a CSI as the only determinant of compensation:

• accuracy and validity of the measurement process;
• measurement of elements beyond the control of plan participants;
• influence of external forces (market volatility; seasonality); and
• plan participant "tampering" with

measurement process.

All four of these potential problems can create winners out of losers, and losers out of winners. In other words, there can be a major disconnect between who receives the compensation and who deserves the compensation. The degree of fallout from this injustice is linked to the type of reward. Honor and recognition awards (certificates, trophies, publicity) place the emphasis on acknowledgment of achievement. They tend to be highly celebratory and social (work groups or teams). Financial rewards tend to emphasize gain-sharing, and individualized rewards, especially when linked to base pay.

Finally, when instituting a financial-based reward system, the company must address two crucial equity issues: distributive justice and procedural justice.

Distributive justice requires that affected employees must be reasonably satisfied with their pay before the plan is implemented, and that employees must be satisfied with the amount of revenue distributed by the plan. Employees will not be fully supportive of a reward plan if they perceive it as management's effort to address a shortfall in basic compensation.

Procedural justice touches on issues previously mentioned, namely that the design of the plan must be based on factors that are largely controllable by employees. Therefore, the company has an obligation to identify the controllable and uncontrollable factors that influence the criteria.

Many compensation or bonus programs target two specific groups: sales and senior management. Moving an external customer satisfaction indicator (CSI) is far more feasible for a salesperson with dozens of customers than for a store manager with thousands of customers. That's why it makes more sense for the store manager to focus on the areas that:

A. They can control, and

B. Have an influence on customer satisfaction like hiring, staffing ratios, and human resource development.

Even the plans for salespeople typically focus on attributes such as responsiveness, ability to solve problems, after-sales service, and ability to communicate, consult and advise, rather than on a single overall indicator of customer satisfaction.

The customer-focused bonus plans for senior management are built on the reality that those individuals control the decisions, and the budgets. The ability of the salesperson or the store manager to delight customers might hinge on additional investments in personnel, training hours, or computer systems. Management has the power, and now the added incentive, to invest in achieving greater levels of customer satisfaction.

Reward system should be win/win

A reward system built on movement of a single external metric such as a CSI will have difficulty meeting these critical success factors. At the very least, a CSI should be only one of several measures on which rewards are based. Perhaps best of all is to translate satisfaction factors into internal measures which employees can influence. This approach yields a reward system which employees and management can embrace, and which will result in positive customer behaviors. ❑

The anonymity gradient

By Bill MacElroy

Editor's note: Bill MacElroy is president of Socratic Technologies, Inc., San Francisco. He can be reached at info@sotech.com or at 415-648-2802.

Over the years, the influence of interviewer bias has been well documented. In essence, this phenomenon accounts for some of the differences found in respondent answers to identically worded questions. One interviewer will tend to have consistently more positive responses from certain groups of respondents; another may have consistently negative or uncooperative outcomes. Much attention has been given to how likable the interviewer is; whether he or she is good-looking, articulate, of a compatible gender, and so on.

One area that we have begun to suspect may be of even more significant influence is the degree to which the presence of any human contact affects respondents' perceptions that their answers are confidential and anonymous.

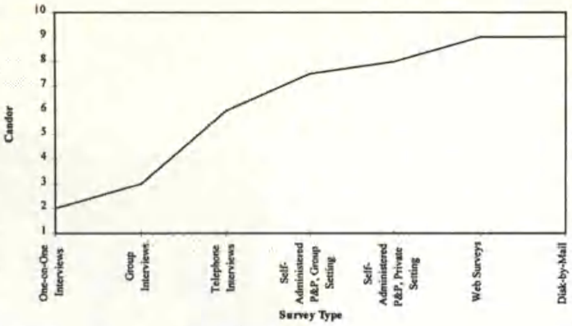
We feel that the privacy of the interviewee's environment may play a key role in the types of answers given because the change in the characteristics of answers doesn't stop when no specific interviewer is present. Even within self-administered interviewing situations, the degree to which the respondent feels "secure and alone" appears to produce more candor. We have called this observed phenomenon the anonymity gradient.

Over the past three years, we have had several opportunities to run side-by-side studies in which the same questions were asked using different modes of field methodology (e.g., one-on-one interviewing, CATI telephone, paper and pencil, disk-by-mail and Web-based interviewing). As we examined the answers to identically worded questions, a curious pattern began to emerge. Increased human presence had the distinctive effect of producing kinder, less frank answers. This difference was also noted between paper and pencil surveys conducted with and without other people in the area.

The most candid answers (based on the degree to which people reported known problems, complained about service that was known to be a concern and gave in-depth responses when probed for areas that needed improvement) came from people using their own personal computers. Researchers have reported that when people use computers they tend to enter a "cool and immersive, womb-like environment" in which the level of engagement can produce exaggerated levels of perceived privacy. This is probably analogous to how people feel totally alone in their cars, when in fact they are surrounded by hundreds of other people who can clearly see them through the glass. Once again, however, the presence of others tends to influence answers. The person at home working on their own computer gives more candid answers than those taking the same questionnaire on a computer in a research facility.

The anonymity gradient can be thought of as a pattern of candor that changes with the perceived level of privacy. This relationship is shown in the chart.

By itself, the anonymity gradient might be an interesting anomaly, but without much practical value. We have, however, found some distinctive characteristics that may be helpful to people as they are planning conversions from certain forms of research to others. This is particularly important if your company has been tracking satisfaction, performance, problem resolution, and other similar topics using telephone, paper and pencil, or one-on-one interviewing techniques. There can be an unpleasant shock to the system when, after many periods of hearing from your customers that they are completely satisfied with no problems to report, you suddenly find out that they are less satisfied and have a whole list of demands for improvement. You may encounter this when converting traditional methodologies to newer technologies.



But this difference isn't necessarily a bad thing. In fact, unless there is some type of vested interest in keeping responses artificially high, the more anonymous technologies may give you more accurate data. Several of the programs we have run have shown that the more candid answers are not the results of some latent "research rage," but rather tend to be more reflective of the real world.

For example, most data related to purchase interest tends to be overstated when actual purchases are tallied. Although we haven't had the benefit of tracking actual results, we suspect that some data related to purchase interest collected using a more anonymous technology may be closer to what will really happen when the product actually ships.

The same is true for satisfaction figures. When people are called on the phone and asked to give an interviewer general satisfaction ratings, the percentage of people reporting high degrees of satisfaction have been found to be 5 percent to 20 percent higher than the same questions administered by disk-by-mail. Which is right? The answer may lie not in ratings but in the analysis of open-ended responses. We often know that there are certain areas that frustrate people and/or cause problems. When electronic data collection methods are used, these areas are far more likely to be mentioned. In addition, the volume of typed versus spoken data reveals that people are willing to take a lot more time describing the situation, suggesting improvements, giving examples, and making competitive comparisons when it's just them and their keyboard.

The anonymity gradient is something that we believe exists and may partially explain the difference in answers between certain types of studies. But before we can be sure of the degree of its influence, more studies should be done. As technology is used more frequently as a tool of research, studies into modified behavior in differing test situations will become increasingly important. ❑

Use customer satisfaction research to drive quality improvement

By Brad Holleran

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Companies that are truly customer focused define quality by how well they meet the wants, needs and expectations of their customers. Knowing and understanding what is important to customers and how an organization performs can lead to improvements in processes, production and service delivery and, ultimately, the bottom line.

The experiences of two companies in different industries illustrate the value of integrating customer satisfaction research into quality improvement initiatives.

A journey, not a destination

Senior Campus Living is a national developer and manager of campus style retirement communities designed for middle income affordability. Kerry Jones, director of management services, leads the company's comprehensive initiatives to improve the quality of its product, which Jones defines as "the service and care of our residents." Senior Campus Living approaches quality improvement as an evolution, an ongoing process, not a program; a journey as opposed to a destination. As a jumping-off place for its quality journey, the company used the results of its recent resident satisfaction surveys to help delineate priority areas of focus.

With the help of a research firm, which used a combination of a written survey instrument and phone and personal interviews, Senior Campus Living gathered input from more than 3,500 residents and guardians in two states. This included customers from across the spectrum of their facilities, including independent living, assisted living and skilled nursing settings.

Some of the respondents' top areas of concern matched those of importance to Senior Campus Living, as well, such as prudent fiscal management of their communities. Others were those that impacted respondents' future personal well-being, such as medical services and emergency responses.

"Overall our ratings were very strong," Jones says. "We found that many of the areas of concern could be addressed not with extraordinary measures such as adding more staff, but simply by educating our residents more fully and improving communication with them."

Jones says the Senior Campus Living Management team prioritized areas of concern, devised action plans and developed specific strategies to make improvements. He is now focusing on defining best practices among the company's communities and standardizing some procedures while still allowing for creativity and uniqueness among the operational teams.

Senior Campus Living also is using an employee survey to secure feedback from its internal customers, which Jones says is equally critical to the company's future and to residents' satisfaction with

the facilities. Both surveys will be repeated regularly, every 24 months.

"Initial surveys give us useful benchmarks to measure against," Jones says. "Repeating the surveys will help us develop a history and know where we need to focus our efforts for change. We want to know at all times where we perform well and where we don't."

The goal: A world-class rating

Glen-Gery is a brick manufacturer with 13 factories in the Northeastern and Midwestern regions of the U.S. whose customers are architects, commercial and residential builders, mason contractors and individual consumers. The company has adopted a philosophy of continuous improvement that recognizes the benefits of a customer-driven organization in increased profitability and market share.

Lynn Silan, Glen-Gery's director of continuous improvement, says the company had sought customer feedback in the past, but more recently has conducted comprehensive research to identify and measure customer satisfaction. "We had asked customers about their complaints in the areas of production and service and we would make changes to address those complaints," Silan says. "Our systematic process now lets us examine specific aspects of service or production and know exactly where we need to improve."

A research firm helped Glen-Gery first define customer satisfaction in its industry. The company then surveyed customers representing 80 percent of its sales volume, measuring performance against 12 different factors related to service and satisfaction. Those factors included promptness in notifying customers about changes in the order, providing correct samples in the required time, honesty and openness, and response to complaints.

Silan says that, from the pure service standpoint, "going the extra mile" stood out as a real customer-pleaser. "Now we train our front-line staff to go beyond what the customer expects, like offering alternatives if a product isn't available and finding solutions as promptly as possible," Silan says.

On the architectural and commercial building side of the business, Silan says one of the top satisfaction factors is "promptness in notifying customers about changes in the order," because an entire construction schedule can be thrown off if the brick isn't ready when planned. "Brick is made from clay and shale and when you deal with a raw material that's not absolutely homogeneous, you sometimes have unpredictable outcomes," she says. "We are extremely diligent about informing our customers of delays."

One area in which Glen-Gery has made significant improvement and, in fact, set a new industry standard, is in the response time to produce samples for customers. In the brick industry, an inventory of samples is not typically available for customers.

Samples are made to order and involve a manufacturing process; faces of the requested brick are cut off and affixed to board with mortar. "We started collecting data that included the date the sample request came in and the date the sample went out, and were dismayed to find that in many cases the process was taking over 20 days," Silan says. "So we worked with the sample-making teams at all sites to improve the process and also began to stockpile a small inventory of brick faces and samples. Now samples go out in two days, on average, and many go out the same day the request comes in."

Measuring factors specific to its customers and its industry has proved to be invaluable for Glen-Gery and enabled the company to target quality improvement efforts. Silan says the company has repeated its customer satisfaction survey every year since 1994 and developed corporate improvement goals and training programs each year based on the survey results. Each year gets better.

"In 1994, 88 percent of surveyed customers were satisfied overall with Glen-Gery," she says. "In 1995, we hit 90 percent and in 1996, our overall rating was 93.8 percent."

The company's goal is a world-class rating of 95 percent, Silan says. Why not 100 percent? Because there will always be customers who select product based on price. "We pride ourselves on providing total value of the product and service we provide," Silan says, "and that's more than just low price. It's quality and service and a lack of problems with an order...the whole experience of buying from Glen-Gery. And that's what we want to be measured on."

Listen carefully

Customer satisfaction research can provide you with essential information about not only your products and service, but also about what you need to be doing differently or better. All you need to do is listen carefully and respond accordingly. Then use this vital feedback to target your quality improvement efforts for maximum benefit. ❑

Beyond customer satisfaction: measuring the components of competitiveness

By Michael Branham

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The idea that customer satisfaction is the central aspect of competitiveness is often overblown. Satisfied customers are undoubtedly an important ingredient in the recipe for long-term business success, but — as many companies have learned the hard way — a high level of customer satisfaction does not always translate to bottom line success.

Just look at Apple Computer. An overwhelming majority of the company's customer base would never consider the possibility of replacing their Macintosh with a PC. But while maintaining a level of customer satisfaction and loyalty that would be envious by any standard, Apple has been struggling to stay afloat for several years.

In an August 25th, 1995 press release, Apple boasted that "Two recent independent studies rated Apple tops in customer loyalty and satisfaction, consistently surpassing every other brand of personal computer. Apple's lead in customer satisfaction is not just a sign of the quality of Apple's Macintosh computer, but also is evidence of the strength of Apple's core business." The same press release went on to say "Obviously, people who use Apple Macintosh computers tend to be happy with them. Apple is especially pleased that Macintosh satisfaction ratings are high across the board — in homes, large businesses, and small businesses." This press release was just one of a series that focused on Apple's superior satisfaction and loyalty ratings in comparison to Windows 95-based PC makers such as IBM, Dell, and Compaq.

Just two years (and two CEOs) later, Apple has realized that there is much more to competitiveness than high customer satisfaction and loyalty ratings. The company recently announced its plans to partner with Microsoft, its long-time rival, in a last-ditch effort to survive. On August 6th, 1997, Apple Computer co-founder Steve Jobs and Microsoft's Bill Gates announced a technology and product development agreement that paves the way for the two companies to work closely on technologies for the Mac platform.

The collaboration is part of Apple's new strategy to appeal to a broader segment of the market, gain new customers, and regain profitability. In short, the company finally understands the three components of real competitiveness: acceptance in the marketplace, customer satisfaction and loyalty, and marketing effectiveness. Understanding the three components of competitiveness will be an important first step in Apple's comeback. The second, and equally important, step may be the development of a formal competitive benchmarking program to monitor the company's progress over time.

Components of competitiveness

When marketers speak of competitive benchmarking they often refer to quality improvement over time, comparative customer satisfaction research, or the acquisition of superior technologies as a means to gain competitive advantage. At Apple, the focus was on comparative customer satisfaction research, which obviously did not go far enough. Perhaps a more appropriate approach to competitive benchmarking is the measurement of a company's level of performance — relative to its peers — in terms of acceptance in the marketplace, satisfaction and loyalty, and marketing effectiveness. With this in mind, a formal research framework is necessary for measuring competitiveness and developing strategies to achieve competitive dominance.

A framework for measurement

In order to measure something, one must have a standardized instrument of comparison. Therefore, the first step in implementing a competitive benchmarking program is the development of standards by which to measure the three components of competitiveness.

Standards of measurement should be relevant, quantifiable, and objective. To meet these criteria, Competitive Benchmarking Associates has developed three indices that measure the core components of competitiveness: the Competitive Strength Index (CSI), the Secure Business Index (SBI), and the Account Development Index (ADI).

Competitive Strength Index: The Competitive Strength Index (CSI) measures the relative competitive standing of all companies providing a given product or service to a defined target market. The CSI is calculated from interview results derived from asking the target market three questions designed to determine which suppliers the collective customer base considers to be current vendors, preferred vendors, and primary vendors.

We use the collective responses to the three interview questions to calculate index scores for every competitor identified by market study participants. Each competitor receives an index score between zero and 100, representing their competitive strength in the marketplace. The CSI reveals strengths and weaknesses of companies serving the target market of interest and provides a yardstick for improving competitiveness over time.

Secure Business Index: The Secure Business Index (SBI) measures the strength, or entrenchment, of the relationship between each competitor and its existing base of customers. It measures key components of the customer-vendor relationship to indicate the overall level of loyalty and likelihood of retention. The SBI is calculated from the responses to several interview questions focusing on issues such as length of business relationship, overall level of satisfaction, and past and anticipated future purchasing behavior. Each competitor receives an index score between zero and 10, which indicates the overall level of loyalty of their customer base.

Determining a company's SBI score, and the reasons behind it, highlights strengths and weaknesses in its relationship with the customer base and provides a standard for measuring improvement in customer loyalty.

Account Development Index: The Account Development Index (ADI) measures a company's success at cultivating strong business relationships with its target customer base. It assesses the company's overall effectiveness at marketing, sales, and account management. ADI scores represent each competitor's level of success in the relationship-building process that is integral to the development of accounts from the initial trial phase into deeper vendor-customer partnerships. Scores are derived from three marketing effectiveness ratios calculated for each competitor. The ratios reflect each competitor's success at becoming a viable current vendor, moving from current vendor status to preferred vendor status, and achieving primary vendor status. Each competitor receives an ADI score between zero and one indicating the effectiveness of its business development efforts and providing a gauge for measuring improvements in overall marketing effectiveness.

Collecting objective data

Unbiased data is critical to the accurate measurement of competitiveness. For best results, professional telephone interviewers — from an outside firm — should collect data from a representative and random sample of the entire target market of interest. Objective information is unattainable when using one's own employees (for obvious reasons) and impossible to gather solely from one's own customer list (because of skewing). Therefore, outsourcing the project to a professional marketing research firm is the best way to ensure the integrity of the data collection process and the objectivity of the market study.

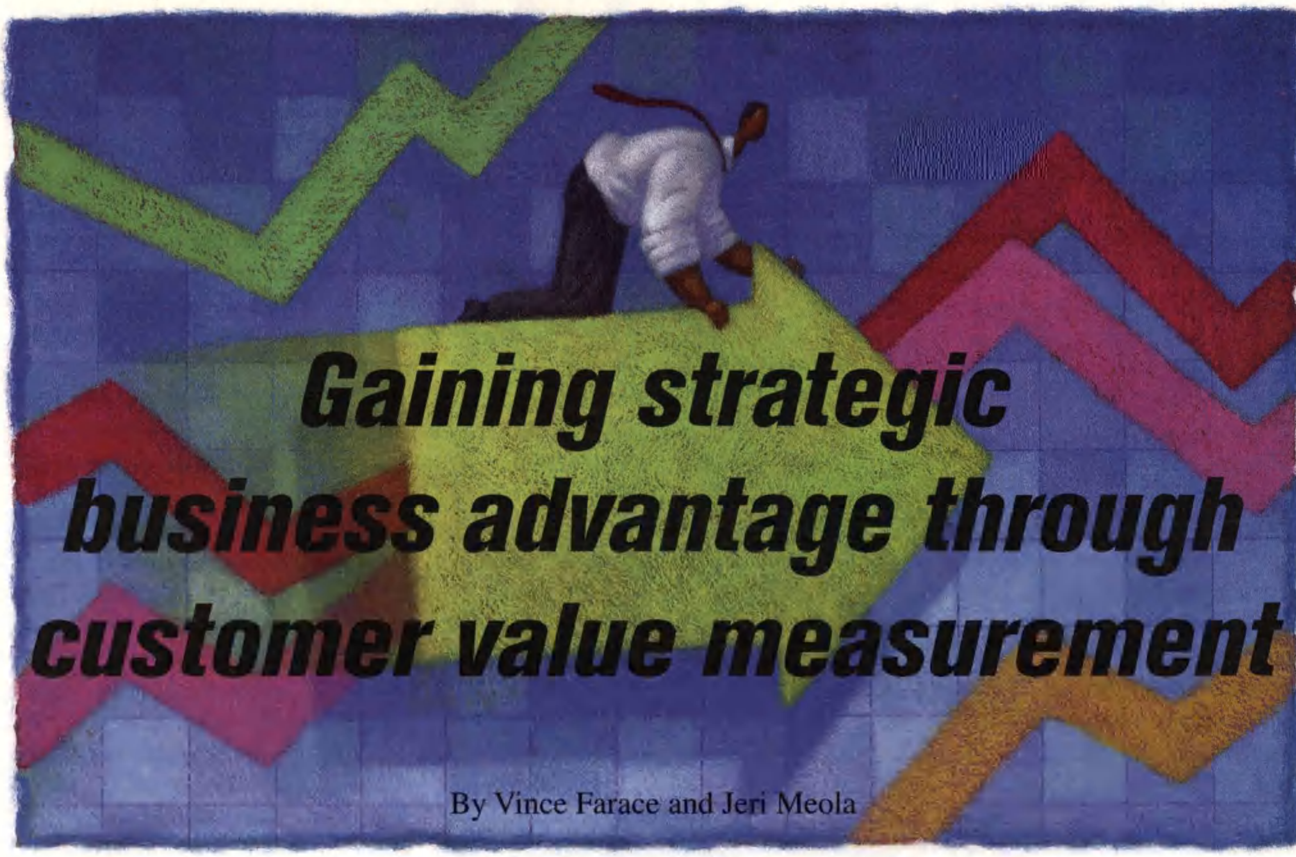
The devil is in the details

The most important data derived from a competitive market analysis, as described here, are not index scores or competitor rankings. The most critical information consists of the reasons behind the performance of each competitor. Without this vital background information, you will get nothing more than an overview of the competitive environment. Therefore, a thorough competitive market analysis always involves asking follow-up questions to determine why interviewees answered each question as they did.

Interviews should include direct open-ended questions about the strengths and weaknesses of your company and its competitors whenever possible. Interviewers should be competent to make notes of the reasoning, relevant comments, and explanations given by interviewees regarding various providers of the product or service of interest. Only then can accurate competitor profiles be developed.

Not an isolated phenomenon

The myopic business philosophy that caused problems at Apple Computer is not an isolated phenomenon. In fact, most companies overestimate the importance of customer satisfaction and underestimate the importance of other factors that constitute competitive strength. Marketing practitioners must constantly remind themselves that high levels of satisfaction and loyalty do not necessarily translate into bottom line success. Apple's problems should be a valuable lesson to every corporation: Competitiveness goes way beyond customer satisfaction. ❑



Gaining strategic business advantage through customer value measurement

By Vince Farace and Jeri Meola

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More and more market research firms are adding customer value measurement (CVM) to their repertoire. Once CVM data are accumulated, however, the real value of the exercise is in deriving business strategies that guide clients to stronger market positions. Obviously, from the client's perspective, it is the market insight that makes the investment worthwhile, not the data. This article outlines some of the essential lessons learned in our five years of specialization in customer value measurement and management. We have found that if these steps are followed in the CVM process, the client gets excellent value for their investment. We also provide some anecdotes to illustrate these lessons.

1. Adopt a comprehensive customer value perspective. It is tempting to say "This value stuff isn't new, we've been asking customers about value for years." But in the customer value arena, only a few authors (see references below for Gale, Kordupleski, Naumann, Slywotzky, Treacy) have presented a comprehensive approach to measuring customer value and linking it to business performance. The most compelling presentation is given in Bradley Gale's 1994 book, *Measuring Customer Value*, where he defines key concepts and metrics, provides worked examples, and discusses how an increasing number of organizations use CVM to guide strategic business decisions.

What are CVM basics?

In the framework outlined by Bradley Gale, this is how CVM works:

• Within a market, customers buy on perceived value.

• Value is based on the benefits customers are expecting to get…

• …compared to the costs they anticipate paying.

• Customers evaluate their market choices against these benefits and costs,

• And choose the products and services that offer the best overall benefit-to-cost ratio.

Companies that routinely offer greater relative value in the marketplace grow their revenues and capture market share. These outcomes in turn lead to increased profitability and more loyal customers.

CVM is applicable in both consumer and business-to-business markets, although it is more challenging to implement in complex, multi-step business situations. Through Gale's extensive speaking and consulting efforts, plus CVM councils in the U.S. and Europe, some 50+ organizations have implemented this approach. There is an emerging set of standard practices and approaches that, while subject to continued development, provide a common basis for CVM practitioners to share important lessons learned. As of today, implementing CVM in an "all new way" runs the risk of noncomparability with the results of other market research processes and, more to the point, runs counter to the direct experience of many senior managers (and potential clients). Nevertheless, in the CVM arena as well as other emerging areas of market research, good new ideas can still rise to dominant positions.

2. Understand your client's strategic business objectives. The purpose of CVM is to provide input and guidance to a client's strategic business objectives. It can provide a critical source of strategic guidance in reaching those objectives. It is imperative to understand where the client organization is going and how the client expects to get there. This requires exposure to the strategic thinking of senior management. The most useful vehicle for obtaining this information is a series of well-planned and professionally conducted face-to-face management interviews. These interviews offer an opportunity to communicate CVM concepts and potentials to senior management, to help them begin thinking in CVM terms, and to clarify their expectations for the overall process.

Here's a conversation between interviewer (I) and manager (M):

M: *So, is this all about improving our sales process?*

I: Well, that and more. It's about offering better value in the marketplace, better value than the competition. Sales plays a role, but what counts in the end is what you deliver.

M: *So, what do I get from this process?*

I: A detailed understanding of how purchase decisions are made in your markets...a metric that quantifies where you stand vis a vis the competition...and some clear product/ service/ marketing/ strategies for getting ahead of the competition.

3. Begin with a clearly defined market segment. Most discussions of CVM assume that the client already has well-defined market segments, and a process for tracking market share in each segment. This may not be the case. But the success of CVM depends on "providing superior market value" and "taking market share from the competition," and consequently CVM initiatives often must begin by developing a workable definition of both the market segment and an appropriate share measure. Failure to accomplish these objectives can doom any subsequent CVM results as "meaningless."

Market segments

Resolving the issue of market segmentation is a significant task. In the absence of clear market segmentation, the following questions should be answered:

1. Which of your products and services are we focusing on?

2. What distribution channels are used to deliver these products and services?

3. What are the characteristics of the consumers or businesses that purchase these items?

4. What type of individual has the primary role in the purchase decision? Who influences it?

5. What is the geographical spread of the market?

6. What is the total available mar-

ket?

7. What portion of the market do you own?

Develop a working definition of the market segment that will answer the paramount question: Who is in the market and who isn't? This definition should be approved by the client and referenced throughout the process.

Establish market share

Some clients assess their performance based on whether their revenues are up or down from a previous time. Otherwise, the client has no formal measure of how well they are performing against the competition. Developing and gaining consensus on a market share measure can also be a laborious process, but given that market share is the key outcome measure of CVM, it must be done.

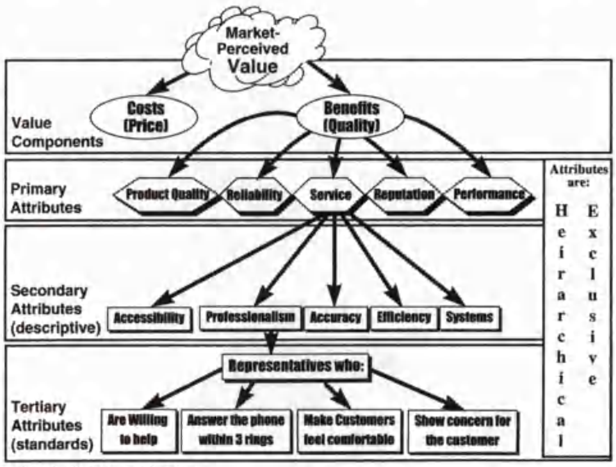
It may be necessary to measure market share as part of the survey process. In one case, lacking a market share measure, SMS estimated it five different ways in the survey, took the modal result and said, "Here's the benchmark." This triggered a year-long program by the client to develop, implement and track a more formally defined measure of market share, independent of any survey process.

4. Build a market database. To conduct a market study, you need a market database. Most clients, although not all, have a reasonably accessible, good-quality database of their own customers. Seldom do they have a database of competitor customers, although there may be a "lost prospect" database. Rarely do clients have information on first-time buyers in a market place. One solution is to take the best customer database the client can provide and merge it with a purchased database from a third-party source. Then, in the front end of the survey, qualification questions are used to verify that the respondents are legitimately part of the market segment. (Of course, it is not likely that the database will have customer names, so an investigative and referral process must be implemented during the interview process to reach the correct person.)

5. Inventory the competition. This seems straightforward, doesn't it?

Clients know who their competition is, don't they? Well maybe, maybe not. In rapidly changing markets, new players may arrive on scene and take substantial business before they show up on the client's competitor radar. Sometimes a client will be fixed on just one competitor while an assortment of other competitors is making real headway. So, be prepared to do your own exploration of the competitive landscape. For SMS, the best early warning about the competitive landscape comes from the reports of competitors sent back during the focus group screening process.

In one CVM study, the client spoke rather disparagingly of the "Mom and Pop" enterprises competing in their market, any one of which was a flyspeck on their competitive radar. However, we demonstrated that, as a group, these competitors accounted for 60 percent of market share. Further, these competitors were very successful competing on price (lower cost structure) and service (faster, more attentive) against our client, one of the industry giants. Since the client was not ready to abandon 60 percent of the market, their thinking about the competition and how to position themselves against them went through major change.



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6. Pay close attention to purchase decision attributes. The heart of a CVM initiative lies in well-defined set of benefits and costs that define the purchase decision process in a market segment. (For consistency with Gale's formulation of CVM, we will typically use quality in place of benefits, and price in place of costs. Clients seem to prefer one set of terms or the other. "Attribute" refers to each price or quality decision factor.)

For a visual portrayal of purchase decision attributes, see Figure 1. Identifying attributes in a new market is always enlightening and sometimes surprising. SMS finds it very useful to simulate the attribute definition process with a client team, prior to actually involving client customers, competitor customers or prospects. This process provides a point of comparison to use once the process has been carried out with the client's customers.

Attributes have the following properties, best arrived at through qualitative, customer-defined processes:

1. Attributes are either price or quality. As part of the attribute definition process, customers will tell you whether a purchase decision attribute is a quality or a price — a benefit or a cost. This assignment is not always obvious. For example, we conducted focus groups with heating and air conditioning contractors about thermostats. Below, "F" is the facilitator, "C" is the contractor:

F: *OK, one of the attributes you've mentioned is the features of the thermostat, like displays and programmability. Is that a price or a quality?*

C: Price.

F: *Price? Help me understand this. When you think about the features a 'stat has, you think about price? Not quality? Why is that?*

C: Let me help you out here. When we see features, we know that the homeowner won't understand how to work them. So they'll think the 'stat is broken. And that it's our fault. They'll call us and we'll have to make a service call. We don't get paid for that. So, features are a price.

2. Attributes are hierarchical and exclusive. Customers arrange purchase decision attributes in a hierarchy. The top-level categories — primary attributes — such as service, for example, or maintenance costs — are built on secondary attributes.

Secondary attributes are descriptors of primary attributes. In the example (see Figure 1), service is comprised of accessibility, professionalism, accuracy, efficiency and systems. Each of these is a secondary attribute under the primary attribute, service.

In turn, each secondary attribute is comprised of tertiary attributes. At the tertiary or third level, standards for performance are defined. For example, the percentage of customers who report that service reps "are willing to help" can be identified and compared with the performance of the competition on this same attribute. The market can define standards in this way, gaps can be identified, and corrective actions can be put in place. (In some cases, these third-level attributes can be expressed in metrics such as time or distance.)

Qualitative techniques — focus groups or one-on-one interviews — provide an efficient way to identify attributes and place them in a hierarchical order. In particular, focus groups allow clients to observe the emergence of purchase decision attributes during the focus group process. This experience can go a long way toward building credibility for the entire CVM process.

CVM attributes should also be exclusive, in the sense that they are uniquely placed in the overall attribute hierarchy. If service is a primary attribute, it cannot also be a tertiary attribute under some other attribute.

7. Be careful what you measure. In executing a CVM project, there is considerable pressure to measure attribute performance and client/competitor performance as economically and quickly as possible. One way to accomplish this is to use derived attribute importance weights, rather than stated importance weights. To obtain derived weights, one can use satisfaction scores on individual attributes to predict an aggregate measure of value, and let the regression weights represent relative importance. After all, isn't predicting what people do more valuable than simply reporting what they say?

There are two problems, however, in using a derived-weights approach to defining attribute importance. First, if the dependent measure of value lacks adequate variance, many of the regression coefficients will drop to zero and the attributes will appear to have "no" importance in the purchase decision process. This outcome will fail the face validity test in the client organization. Second, the use of regression coefficients to represent the relative importance of the attributes can face a tough sell on their own in the client organization. ("So, what exactly is a standardized beta coefficient, and how do I interpret these two numbers?"). This may not be a problem for the direct client, but to others in the organization who have to accept the results and act on them, making large-dollar business decisions based on measures unfamiliar to them can be difficult.

Consequently, our preference is to gather stated importance weights, but to also develop derived weights. We then use the two sets of information to further understand the purchase decision process. At the cost of a somewhat more involved research process, the client is ensured of having usable results that can be understood and accepted by a variety of individuals in the client organization.

8. Review the CVM table, point-by-point. A sample CVM summary chart is shown in Figure 2. In this example, the results for six quality attributes and three price attributes are presented, along with a comparison of "Client Company" and "Company A," the competitor.

Sample Customer Value Ratio Table: Client Company vs. Competitor

Benefits (Quality Attributes) (What the Customer Gets) 1	Competitor Importance Weights 2	Client Company Ratings (n = 200) 3	Competitor Ratings (n = 100) 4	Ratio 5 = 3/4	Weight x Ratio 6 = 5 x 2
Product Quality	0.14	9.33	4.54*	2.06	0.29
Service	0.27	6.11	7.26*	0.84	0.23
Options	0.15	6.79	7.06	0.96	0.14
Reliability	0.05	8.72	3.43*	2.54	0.13
Reputation	0.23	8.43	8.54	0.99	0.23
Performance	0.16	8.97	7.84*	1.14	0.18
Sum of Weights	1.00**			MPQ Ratio:	1.20
Costs (Price Attributes) (What the Customer Pays)					
Acquisition Cost	0.36	7.14	8.57*	0.83	0.30
Maintenance	0.33	6.90	7.58*	0.91	0.30
Installation	0.31	6.69	6.43	1.04	0.32
Sum of Weights	1.00			PC Ratio:	0.92
Overall Weight for Quality: 45%			Overall Weight for Price: 55%		
Customer Value Ratio: 1.05			Advantage for Quality: 20% Advantage for Price: -8%		

* Competitor is significantly different from Client Company rating at the .05 level.
** Weight distribution is significantly different from uniform at the .05 level.

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Column 1: Identifies attributes measured at the primary level. Customers make purchase decisions based on attributes such as product quality or reputation or maintenance.

Column 2: The relative attribute importance weights, summing to 1.0 separately for price and quality. What's the most important quality weight? (service = 0.27). Least important? (reliability = 0.05). The double asterisk (**) indicates that the quality weights differ significantly from one another. For the three price attributes, the weights don't differ significantly.

Note that the table heading says "Company A Importance Weights." In this example, we have used the attribute weights of customers who primarily do business with the competition. This is the audience our client wants to win over. It's a more challenging group than if we were to just use the client's customers to provide the weights. Alternatively, we could use market weights, in which we use relative importance scores based on a weighted average of all the customers in the marketplace. (If the client has 40 percent market share and six other competitors have 10 percent each, then we construct composite scores reflecting the distribution of market share.)

Column 3: These scores are mean performance ratings on a 10-point scale (10 high) of the client company on each quality and price attribute. What do you see? Our client has great product quality (9.33) but mediocre service (6.11). Service and options are quality attributes where the client can improve. On price, there is room for performance improvement in all three attributes.

Column 4: These are the competitor's scores. They range from a low for reliability (3.43) to a high for acquisition cost (8.57). Overall, not a great set of scores. Note that there are single asterisks (*) next to some of the attributes. This indicates whether the performance scores are significantly different between the client and competitor.

Column 5: This column presents the relative performance scores for the client and competitor. These results show, on an attribute-by-attribute basis, the percentage that client and competitor are better or worse than the other is. We obtain the percentage by dividing the client's rating by the competitor's rating. For reliability, the client is viewed in the market as 2.54 times as reliable. But the client performs 17 percent worse than the competitor on acquisition cost.

Column 6: Now we take the importance weights from Column 2 into consideration. We want to adjust the relative ratings in Column 5 by the attribute's weight (if we didn't take this step, we're assuming that all the weights are equal).

We sum the values for the quality attributes and obtain a market-perceived quality (MPQ) of 1.20. In other words, customers view the benefits of the client's products and services as 20 percent superior to those provided by the competition. For the price attributes, however, the client receives a price competitiveness ratio of 0.92 or 8 percent less than the competition.

There's one more piece of data to present. As part of the survey process, customers are asked a question of the form "all things considered, do you give more emphasis to the benefits you receive or to the cost you pay?" These customers are somewhat more price-sensitive than quality-sensitive — they weight price at 55 percent and quality at 45 percent.

The formula for calculating a customer value ratio (CVR) is:

Market Perceived Quality x Overall Quality Weight + Price Competitiveness x Overall Price Weight = CVR

For this example, the CVR is 1.05. This is the summary number to focus on in the chart. Therefore, taking into account all the benefits and costs customers anticipate in a purchase decision, the client organization is perceived to offer about a 5 percent value advantage.

9. Identifying business strategy. There are two basic approaches to developing business strategy recommendations from CVM results. First, you can test the results against the client's current or existing strategy and identify any gaps or complementarities. Hopefully, the two are in sync, but if not, this needs to be clarified. Second, you can develop new strategic directions and test them out hypothetically, using the CVM results as the starting point.

What are some of the business strategy implications of the results shown in Figure 2? Here is how to find them:

• Compare the overall weights for price and quality (here, 55 percent vs. 45 percent). This result provides customer data on the market's price sensitivity and can make an important contribution to the classic dialogue between sales and production ("We could sell a lot more if we could just lower our prices"). We have seen these P/Q values range from 80:20 to 20:80. Understanding the market's price sensitivity is a critical element in developing a comprehensive CVM approach.

• Review the individual importance weights. What's high? What's low? How do the client's current sales and marketing approaches support these weights? Do they work together or are they at odds? Consider these weights in light of the organization's culture. While not the case in this example, old-line companies often put great faith in their reputation ("We've been in business for 75 — 100 — 150 years and customers buy because of our reputation.") while the harsh realities of business in the '90s often discount reputation very heavily.

• Review the performance scores. Where are the areas where improvement is needed? Look for areas where the greatest amount of "headroom" for improvement exists. This is not in the 9's or perhaps even the 8's. But in 7's or below? They look promising. What is feasible?

• Set CVR targets. Some companies are happy to achieve a positive CVR in selected markets. If their CVR is 1.01 or better, they are content. But in the end, to gain market share and grow the business, more aggressive goals are needed. The benchmarks for this performance, derived from the PIMS (Profit Impact of Marketing Strategies) database, are reported in Gale's *Managing Customer Value*. These data suggest that a sustained CVR of 1.20 will yield the market dominance that so many organizations seek. So, the strategic goal for the organization? Achieving — and maintaining — a perceived 20 percent superior value perception in the marketplace.

• Explore alternative scenarios. Once a goal is set, the CVM table can provide guidance on high-payoff strategic directions. There are several avenues to pursue:

-- Which set of attributes offers the greatest multiplier to any improvements the client makes? (In the example, price is weighted higher than quality, so any improvement in a price attribute has its impact multiplied at a 55/45 rate.)

-- Where can the client boost performance ratings most readily? For example, if the client increases satisfaction with maintenance from 6.90 to 8.20, how much will that increase the client's CVR?

-- Are there ways to change the market's importance weights? The client might choose to differentiate on service (not uncommon in today's economy). By adept combinations of communications and performance improvements, the client can elevate the importance of service from 0.27 to something higher, thus increasing CVR.

• Revisit the attribute descriptions.

The customer comments from the focus groups and/or qualitative interviews used initially to define the attributes are a rich source of further insight. A careful review of the comments, sorted into the primary/secondary/tertiary attributes they represent, can shed considerable light on their "meaning." These comments can enhance the client's understanding of each attribute, what customers are looking for in that area, and how best to interpret it.

• Make concrete recommendations. If the purpose of customer value research is to provide strategic business guidance to the client, the time has come to identify what the client should do. The entire set of individual improvement possibilities identified in the CVM table should be taken into account.

In the current example, the best approach appears to be a combined service and maintenance strategy. In the short run, the service delivery system can become a highly visible testimonial to the client's newly invigorated approach to the market. Improvements in service delivery can often be achieved with less investment and with faster results than in other areas. Service here has the largest importance weight (0.27), but the worst relative performance (0.84, 16 percent worse than the competition), and thus is a good candidate. In the longer run, maintenance offers high-payoff potential. The client begins at a disadvantage (0.91, worse by 9 percent), there is room for performance improvement (6.90 on up), and maintenance's role as a price attribute (with an 0.33 weight) yields an extra kick from the relatively greater importance of price over quality (55/45).

Powerful technique

Customer value measurement is a powerful technique for bringing market perceived quality and price considerations into the business planning process. We have outlined the main ingredients in successful implementation of CVM as we have experienced it over the past five years. SMS is committed to further development of all aspects of the process, with special concentration on the consulting interventions that will help organizations gain full value from the CVM investment. ❑

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Survey Monitor

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turned to sources other than dealers for vehicle shopping assistance. Now more than 20 percent are using shopping services. This is just the beginning of vehicle shopping outside the showroom."

The study also found those shopping through alternative sources are mostly considering four or more makes and were disenchanted with their past dealer purchase experience. They are using these alternative services to help them narrow their list and make an educated, value-conscious decision.

The profile of the shopper using these services is distinctive. They are younger than the traditional dealer shopper; have higher income than dealer shoppers; buy European nameplates 1.5 times as often; are less satisfied with prior purchase experience at a dealership; and consider a larger number of nameplates. For more information call 818-889-6330.

Study finds more consumers choosing supermarkets for home meals

Supermarkets have gained significantly in the take-home meal market, according to the latest consumer trends study by Food Marketing Institute (FMI), a Washington, D.C., food industry trade group. This year, one in five consumers (22 percent) said supermarkets are their main source for food consumed, but not prepared, at home — a significant increase over recent years and double the level of a decade ago. Supermarkets have become as popular as restaurants for take-home food (21 percent), and while fast-food restaurants still lead, their share slipped significantly (48 percent in 1996 to 41 percent in 1997).

The findings come from FMI's report "Trends in the United States: Consumer Attitudes & the Supermarket, 1997." The survey was conducted by Abt Associates Inc., Cambridge, Mass.

Supermarkets are offering shoppers meal solutions with products that save time and steps in preparing a home-cooked meal, as well as prepared, ready-to-eat or -heat food products that make it easier to prepare food at home. Their efforts are right on target. The FMI survey shows that consumers crave convenience and generally eat their main meal of the day at home.

Shoppers continue to give their primary supermarket high marks for overall performance this year. The average rating was unchanged at a healthy 8.1 on a scale where 10 means excellent. They shop an average of 2.2 times a week and spend an average of $83 a week for the household, $33 per person. When selecting a primary supermarket, they continue to care most about having a clean, neat store; high-quality produce; high-quality meats; courteous, friendly employees, and use-before/sell-by dates on products.

Even with the high approval ratings, there are challenges for the industry. "It seems that consumers have never been more demanding than they are today," says Michael Sansolo, FMI's senior vice president. "They are pressed for time. Money is still an issue for many consumers, reflected in their persistent concern about inflation, even though the facts fail to support this perception. Their tastes are increasingly diverse — whether it's gourmet foods, ethnic foods or organic offerings."

Shoppers increasingly are using frequent shopper programs and credit cards for purchases. They also use some newer features when available in their stores: in-store restaurants (32 percent use these at least once a month); child care (21 percent), and affinity credit cards (21 percent).

They are searching for a wide variety of products and services, especially those that offer convenience, quality and value. This year, more shoppers cite as "very important" several features that can make shopping easier: accepting ATM or debit cards and credit cards; having an in-store pharmacy that fills prescriptions, and having pre-cut, marinated or pre-seasoned meats or ready-to-eat poultry.

The FMI Trends report also shows areas where supermarkets need to improve to meet consumers' expectations. The industry needs especially to focus on meeting shoppers' expectations for low prices, personal safety, fast checkouts and accurate shelf tags.

This year, consumers were asked how long they shop and wait in the checkout line on an average visit to their primary supermarket. Nearly half (48 percent) spend 30-60 minutes from store entry to store exit. Over 25 percent spend less than 30 minutes; 23 percent spend more than an hour. Over half of shoppers (59 percent) spend at least five minutes in the checkout line, with 22 percent spending least 10 minutes. Supermarkets must continue to focus on speeding up the checkout, especially during busy hours, Sansolo says.

Among other findings, the Trends study shows that confidence in food safety remains high: 83 percent are completely or mostly confident that food from their supermarket is safe. Their leading concerns are spoilage-related. Also, more than nine in 10 shoppers remain very or somewhat concerned about the nutritional content of what they eat.

Many supermarket products and services that shoppers perceive as useful are not frequently used when available. For example, 67 percent of shoppers say that they would use nutrition and health information at least once a month if it were available at their primary grocery store, but only 58 percent of shoppers use this information at the stores where it is available. Similarly, consumers frequently underestimate the potential use of many of these products and services.

Other study highlights:

• Half of all shoppers expect their personal circumstances to improve in 1997, continuing an upward trend. Shoppers' optimistic outlooks point to a solid year ahead for retailers. Confident shoppers will be willing to try new products and services that offer value and convenience.

• Increasing shoppers' ratings of product quality, customer service and employee courtesy, and product choice offer the greatest potential to increase consumer satisfaction.

• In an average month, shoppers visit 2.6 different stores for groceries. Almost half of shoppers visit three or more different stores.

• One in five shoppers most frequently visit supermarkets to buy food that is eaten at home but not prepared at home. This is a significant increase over recent years, and double the level of a decade ago.

• Almost nine in 10 shoppers usually eat their main meal of the day at home. Almost all of these shoppers (96 percent) consider that meal to be home-cooked.

• Over 60 percent of shoppers have changed products because of information on product nutrition labels, down from 70 percent last year.

• Shoppers are purchasing products

labeled as "low fat" (82 percent), "low cholesterol" (64 percent), "natural" (63 percent), and/or "low salt" (61 percent). Nearly 40 percent of shoppers also seek products labeled "organic."

• Nearly one in five shoppers (18 percent) holds their supermarket primarily responsible for food safety. More shoppers also take responsibility themselves or count on manufacturers or the government.

• About half of all shoppers say that they are doing something different as a result of the safe-handling labels on meat products, an increase from last year. For example, in 1997 18 percent of shoppers wash/disinfect counters, cooking areas or utensils after contact with meat, up from 11 percent in 1996. More shoppers in 1997 report washing their hands, cooking properly, not leaving meat out to thaw, and washing meat.

• Shoppers are very interested in biotechnology and food irradiation as ways to address food safety and product quality issues. Six in 10 shoppers say that they are very likely or somewhat likely to buy products either modified by biotechnology to reduce pesticide use or treated with irradiation to kill germs. For more information call 202-452-8444.

Home Usage of Specific High-Tech Products

All Households		Households that Own a Computer	Households that Access the Internet	Weighted Total
Respondents	100%	100%	100%	
Personal computer	42	100	100	
Cellular phone or car phone	34	51	57	
Bank-by-phone services	21	29	36	
Electronic home security system	14	21	23	
Fax machine at home	13	28	43	
Video game system at home	35	48	47	
Telephone answering machine/voice mail	73	89	95	
Electronic pager or beeper	26	39	47	
Unweighted Base	1012	445	202	

Let the machine take the call

Whether it's because they're screening calls or are simply not at home, Americans in growing numbers are having telephone answering machines or some other kind of voice mail handle their incoming telephone calls.

So says the Chilton Research Services Express poll, a nationwide telephone survey of a random sample of Americans ages 18 and older, conducted by Chilton Research Services, Radnor, Pa. In the poll, 73 percent of respondents said that someone in their household uses a telephone answering machine or some sort of voice mail service at home. That's nearly a 10 percent increase over the April 1996 figure.

Over 87 percent of households with an annual income over $50,000 — perhaps not coincidentally, prime targets for telemarketers — said they use such machines. Other groups in which usage is high include those who have attended college (84 percent) and the 18-to-34 age group (82 percent).

A whopping 89 percent of households that own a computer also own a telephone answering machine or other voice mail device. Demographic groups with low usage include those with less than a high school education (44 percent), households with an annual income below $15,000 (47 percent) and those ages 65 and older (50 percent).

One surprising finding of the Express poll is the widespread home usage of electronic pagers or beepers. Better than one in four respondents said that someone in their household uses one of these devices at home. That's a greater percentage than those who use a fax machine at home (13 percent), an electronic home security system (14 percent) or bank-by-phone services (21 percent). Beeper/pager usage is particularly high among the 45-to-54 age group (42 percent), and households with an annual income above $50,000 (40 percent).

The survey also indicates that owners of any one high-tech device are likely to own others as well. For instance, 62 percent of those who use electronic pagers at home also own computers, versus 42 percent of all households. Of those who own a home computer, 28 percent also use a fax machine at home. Conversely, 91 percent of fax machine owners also own a computer.

The Chilton Express telephone omnibus survey was conducted among a sample of 1,012 American men and women ages 18 and older, between April 16 and April 20, 1997. The margin of error for the survey is ±3 percent. For more information call 610-964-4600.

Seniors spend more on vacations

Americans over the age of 50 spent an average of almost $5,000 on vacation travel in 1996. This was 74 percent more than Americans between the ages of 18-49, according to a national study conducted by Directions for Decisions, Inc., (DFD), a Jersey City, N.J., research firm.

The study on travel patterns is part of a quarterly omnibus survey of the attitudes and opinions of mature Americans on a wide variety of topics. In addition to travel and vacations, the study also included the topics of food, clothing, insurance, and health. Entitled the "Mature Market Omnibus," the study will be conducted quarterly to identify trends among the mature market, a growing segment of the United States population.

In a telephone survey, using a national probability sample representing total U.S. households, responses were obtained from 506 men and women over the age of 50 and 301 respondents between the ages of 18 and 49.

Future quarterly waves will sample 1,000 households in the 50+ market.

The study indicates that age is not an important factor in the decision to travel or the frequency of vacations, but does impact the vacation budget. It also indicated that:

• Adults over 50 spent an average of $4,794 on vacations last year versus $2,757 for the younger segment.

• Roughly seven in 10 respondents, regardless of age, took at least one vacation trip last year (73 percent of respondents ages 18-49 vs. 69 percent of adults 50 and older).

• Of those who did travel, the younger group took an average of 3.5 vacations last year vs. 3.7 for the older group.

The study also showed that Canada is favored as a destination by the mature market over Europe and Mexico. While 28 percent of mature respondents said they had visited Canada during the last five years, versus 13 percent for Europe and 18 percent for Mexico, 52 percent said they planned to visit Canada in the future. This compares with 40 percent who expressed interest in visiting Europe in the future and 31 percent who cited Mexico.

Mature adults like to take their extended families along on vacation. Almost half the respondents — 48 percent — said that they had taken children or grandchildren on a vacation during the past five years and 61 percent said they planned to do so in the future.

Cruise ships have appeal for mature vacationers. While only 16 percent said they had taken a cruise during the last five years, 40 percent said they were interested in taking a cruise in the future. For more information call John Almash at 201-413-9000.

What back-to-school really means to teens

A recent study shows that what teens most look forward to about going back to school is neither outfitting themselves with the latest styles nor readying themselves for their classes. Instead, what students are most excited about is the social aspect of school.

The nationwide study of 2,008 12- to 19-year olds by Teenage Research Unlimited, a Northbrook, Ill., research firm, found that seeing friends after summer's end (89 percent), meeting new people (84 percent), and seeing how people have changed (81 percent) are the top three aspects exciting teens about going back to school.

Teens are also looking forward to parties (78 percent), entering a new grade (77 percent), the social scene in general (71 percent), and shopping for new clothes (70 percent). Teachers and parents will undoubtedly find consolation in that two-thirds of respondents (67 percent) said they look forward to learning "new things."

Respondents were also asked what they're least looking forward to about going back to school. There was one overwhelming response: homework. In fact, 83 percent of teens offered this answer. Just more than 40 percent of the total sample said that they're not looking forward to going to a new school.

The study also found that teens spent an average of $53 a week of their own money during this past summer and $27 a week of their family's money. Boys outspent girls in total, $82 vs. $78. For more information call 847-564-3440.

Wendy's wins the taste war

Just about everyone in America eats fast food, but their reasons for choosing a restaurant are as diverse as the menus at the Big Three burger chains. A TeleNation survey conducted by Market Facts, Arlington Heights, Ill., found that among the Big Three fast-food vendors, Wendy's is America's favorite, with 37 percent of the vote. Burger King came in second place, with 31 percent. and McDonald's was third, at 23 percent. Taste of the food was the overwhelming deciding factor for most diners. The survey found 70 percent of respondents cited taste as being most important; 13 percent cited convenience and just 9 percent mentioned price.

Of the Big Three chains, McDonald's has the fewest taste fans. Of those who cited Wendy's as their favorite chain, 82 percent said their decision was based on taste. Similarly, 76 percent of Burger King loyalists cited taste as their deciding factor. But just 45 percent of those who prefer McDonald's said taste was most important to them.

Convenience tends to be more important to McDonald's lovers than to fans of the other two chains. For example, 29 percent of those who favor Mickey D's cited convenience as the deciding factor, compared with 11 percent of Burger King devotees and 5 percent of Wendy's fans.

McDonald's seems to have better success with young adults than the older crowd: 32 percent of those 18 to 24 said they favored the golden arches, compared with, for example, just 12 percent of people aged 55 to 64. For more information call 847-590-7000.

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rent president of DataDeeds. For more information call 301-879-1552.

How do consumers make their produce choices?

The Consumer Research Network, Philadelphia, is offering a report designed to help food marketers understand consumers' views of 35 produce categories. Based on research with 202 shoppers on their current and potential use of produce items, the If/Then Produce Study covers 10 barriers that shoppers face in trying to increase their consumption, and covers topics such as the role of convenience, belief in media hype and concerns about quality, price and safety. For more information call Mona Doyle at 800-291-0100.

New product, updates from Cardiff

Cardiff Software, San Marcos, Calif., is now shipping its TELEform Internet Solution. Optimized for Windows 95 and Windows NT, the product automates the process of creating, distributing and reading information from HTML-based forms. TELEform documents are converted into HTML-based forms and can be placed on the Internet/Intranet to be filled out by anyone with a Web browser. Completed forms are transmitted, using standard protocols such as MAPI or POP3, directly to the TELEform Internet Server. The TELEform Reader then converts the information into the appropriate database language and transmits the data to the specified database. The company has also updated its TELEform Standard data processing product and TELEform Elite forms processing system to version 5.3. For more information call 760-752-5244 or visit the company's Web site at http://www.cardiffsw.com.

Tracking system from Griggs-Anderson

Griggs-Anderson Research, Portland, Ore., is now offering the Performance Tracking System, an electronic tool designed to provide ongoing feedback on service and product performance. The service is designed to monitor technical and customer service satisfaction, product satisfaction, advertising and promotion effectiveness, sales contact outcomes, company or product awareness, and company image. For more information call Deb Givens at 503-241-8036 or visit the company's Web site at http://www.gar.com.

Pulse Train updates Pulsar

U.K.-based Pulse Train Technology has released Pulsar 2, an update of its Windows interactive data analysis package. Designed to be smaller and faster than its predecessor, the product lets users analyze larger data sets on a desktop PC. The program also features a new graphics package and can perform additional statistical analyses such as Chi-square and t-tests. For more information contact James Cottrell at 44-1-483-300100 or at james@pulsetr.co.uk or visit the company's Web site at http://www.ws.pipex.com/ptt.

View credit card mailings on CD

BAIGlobal Inc., Tarrytown, N.Y., now offers Inside Track Communications Finder, a CD-ROM program that allows users to view competitive credit card communications such as statement inserts and solo mailings sent by credit card issuers to encourage frequent card use and customer loyalty among cardholders. Users can search for communications by card issuer and/or type by clicking on the issuers and communication categories they wish to see. Copies of all communications can then be printed out. For more information call 914-332-5300.

Quantime enhances Web research capabilities

Quancept Web from Quantime Corp., New York, makes available the options in traditional CATI and CAPI research for Web research. By adapting existing survey software for CATI and CAPI, Quancept Web allows researchers to use complex routing and randomization procedures used in non-Web surveys. It also allows rotation of questions and response lists. The product has built-in consistency checking and allows rewording of questions based on answers to previous ones. Users can display pictures and play music or sounds. For more information call 212-447-5300.

Software gives retailers store-level feedback

ACNielsen Corp., Stamford, Conn., has launched SPACEMAN Viewer, a software application that provides retailers store-level feedback on their merchandising programs by letting field personnel directly view and act on floor and shelf plans. With the software, users can view planograms prepared by merchandising analysts, make comments on them and return them to the analysts for further action. If the planogram requires no further comment, the user can print it out along with charts and reports to execute the desired floor or shelf plan. The product is available on CD-ROM, diskette or through the company's Web site at http://acnielsen.com. For more information call 203-961-3330.

Sawtooth updates Sensus

Sawtooth Technologies, Inc., Evanston, Ill., has released version 2.0 of its Sensus interviewing software. The new release offers enhanced capabilities within the core module, Sensus Q&A, and new modules (Sensus Multimedia, Sensus TradeOff, Sensus Choice and Sensus Advanced Development Environment) that can be coupled with Sensus Q&A to meet specialized needs. For more information call 847-866-0870 or visit the company's Web site at http://www.sawtooth.com.

New SPSS product determines sample size

SPSS Inc., Chicago, has introduced SamplePower, a new product that enables researchers to determine the correct sample size for research before data is collected. An interactive guide takes users through the process, explaining terms and choices along the way. An interactive summary describes current settings. For more information call 312-329-2400 or visit the company's Web site at http://www.spss.com.

Free name generation guide

The Namestormers, a name development firm in Lago Vista, Texas, is offering a free Naming Guide, which includes a do-it-yourself naming checklist, a list of techniques and tools for naming, and hot links to other Web sites containing naming resources. The guide is available from the company's Web site at http://www.namestormers.com.

Shared-cost plant biotech study from Doane

Doane Marketing Research, St. Louis, and Kline Company are teaming up to conduct a major shared cost study entitled "U.S. Plant Biotech Impact: Business Analysis: 2007." The study objectives are focused on first measuring and then forecasting the impact of new biotechnology seed traits on the use of crop protection chemicals on corn, soybeans and cotton. Emphasis will be placed on projecting impacts by active ingredients and by company. For more information call Marypatt Corbett at 314-878-7707.

Distribute questionnaires over the Internet with EZSurvey

Raosoft EZSurvey, version 1.0, is now available from Raosoft, Inc., Seattle. The 32-bit electronic data collection program lets users distribute questionnaires over the Internet, Intranets or any standard E-mail system. EZSurvey will also post a questionnaire on a Web site. The program is designed for use with Windows 95 or Windows NT and utilizes Microsoft Exchange, Lotus Notes or cc:Mail to distribute the questionnaires. For more information call 206-525-4025 or visit the company's Web site at http://www.raosoft.com/raosoft.

PACE aids new product development

Tragon Corp., Redwood City, Calif., has introduced its Product Acceptance and Consumer Evaluation (PACE®) Program, which integrates sensory evaluation and market research. By assessing consumers' perceptions of key marketing components such as brand, price, packaging and labeling, PACE is designed to segment the consumer market by interest, identifying unmet customer needs and clarifying attribute differences that drive segmentation. For more information call 415-365-1833.

Setting priorities

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The investors were asked to provide an overall rating of their stock broker or financial advisor. Their responses are shown in Table 1.

Table 1
Overall Rating of Broker/Advisor

Superior	19%
Excellent	19
Good	37
Fair	25
Poor	-
	100%

The rating scale used on this survey is one we use quite often. There are several reasons we like it. First and foremost is that it tends to coincide with how people judge a product or service in their own minds. If you gather together a group of laypeople and ask them to devise a product or service rating scale, it's unlikely they will come up with the kinds of scales many market researchers like to use. (How likely would it be that such a group would develop a 10-point scale anchored at the ends with "excellent" and "poor"?)

The second reason we like this scale is that it has an odd number of points. It's not good to force fence riders to jump to one side or the other, particularly when it's been repeatedly shown that most of these people, if forced, will be more generous in their evaluations than less generous. Third, this scale includes a "superior" category. If people are, by nature, generous with their evaluations, at least in a marketing research context, there must be a way to differentiate those who would rate an organization "excellent" and those who would rate it as "virtually unrivaled." "Superior" does this for us as is shown in Table 1.

In addition to obtaining an overall rating of the type just described, the researcher can also measure overall customer satisfaction by asking the customer if he or she would recommend the product or service to a friend. In those surveys where we ask such a question, our choices are usually limited to three: "Yes, enthusiastically," "Yes, but with qualifications," and "No." In this particular survey we did not ask this question. In hindsight, we should have. The survey revealed that 44 percent of the investors first became aware of their broker or financial advisor because he or she was recommended to them by someone they knew. In this segment of the investor market, the ability to get referrals appears to be critical to success.

After providing the overall rating, the investors were asked to indicate how much improvement was needed by their broker or advisor for each of several service elements. The choices were "No improvement needed," "Some improvement needed," and "Considerable improvement needed." There are a number of reasons we prefer this "improvement needed" scale. Foremost among them is that the answer given is a message to management that requires absolutely no translation. Contrast that with answers such as "Exceeded my expectations," "Met my expectations," and so on. These answers are meaningless unless you know what the expectations are. Even then it's not obvious what to do with the information. If you go to the post office expecting to wait in line for 20 minutes, but only have to wait 15, just how satisfied are you?

Table 2 shows the average ratings of 14 individual service elements. The scores were developed by assigning a numerical value for each of the three answers: three for "No improvement needed," two for "Some improvement needed," and one for "Considerable improvement needed." (A fourth option, "Don't know/Not applicable" was also available to the investors. These responses were not included in the calculations of average ratings.)

Table 2 also shows the correlation (r^2) between each service element and the overall rating. The correlations were mathematically derived directly from the survey data. This correlation is an indicator of the degree to which the individual service elements influenced the overall rating. It is also an indicator of how important each service element is to the investors' overall assessment of their broker or advisor.

Table 2
Ratings of Individual Service Elements and Their Correlations With The Overall Rating

	Rating (1-3)	Correlation (0-1)
Explaining investment risks	2.88	0.13
Frequency of account statements	2.87	0.06
Willingness to correct problems quickly	2.83	0.07
Accuracy of account statements	2.79	0.06
Variety of investment products offered	2.76	0.16
Following instructions	2.76	0.11
Prompt reporting of buy/sell transactions	2.75	0.11
Understanding your financial objectives	2.69	0.22
Frequency of contact	2.61	0.20
Simplicity of account statements	2.50	0.01
Recommending what is best for you	2.50	0.26
Quality of buy recommendations	2.22	0.35
Quality of sell recommendations	2.10	0.28
Commission rates	2.00	0.44
Average	2.59	0.18

A quick look at the table shows that there is no strong relationship between the individual ratings of the various service elements and the correlation figures. To help sort out the information in Table 2, a 2x2 grid was set up to separate the service elements into four groups. This grid is shown as Table 3.

The lower right box in the grid identifies those service

Table 3		
	Below average correlation	**Above average correlation**
Above average rating	Explaining investment risks Accuracy of statements Frequency of statements Correct problems quickly Variety of investment products Following instructions Prompt buy/sell reporting	Understanding your objectives Frequency of contact
Below average rating	Simplicity of statements	Recommending what's best for you Quality of buy recommendations Quality of sell recommendations Commision rates

elements that are the primary problem areas for this upscale segment of investors. These four items received below average ratings and had an above average degree of influence on the overall rating (as measured by the correlation coefficient).

Service elements listed in the upper right box are the industry's strengths. These two items received above average ratings and had an above average degree of influence on the overall rating.

Elements listed in the upper left box received above average ratings but were not highly correlated with the overall rating. No additional resources need be applied to improving industry performance in these areas.

The one service element ("simplicity of statements") listed in the lower left box received a below average rating but did not have much influence on the overall rating. Correction of this problem does not need to be a priority.

An analysis of the type described has one weakness that should be pointed out. If all of the major competitors in the market have the same deficiency, say, "Simplicity of statements," then this service element will not differentiate one competitor from another. Consequently, the correlation between "Simplicity of statements" and the overall rating will be small. If this is the case, there may be an opportunity for the astute brokerage house to further differentiate itself from the competition by creating statements that are readily understood. A review of the data itself will show how much response variance there is for each of the individual service elements.

The data used in this article show how all the upscale investors surveyed view their individual brokers and financial advisors. However, the strengths and weakness indicated are those of the industry, not of the individual brokerage houses or advisors. The very same techniques can be employed to look at the customers of specific organizations to determine what the important strengths and weaknesses of those organizations are. Priorities for action can then be set. ❑

Data Use

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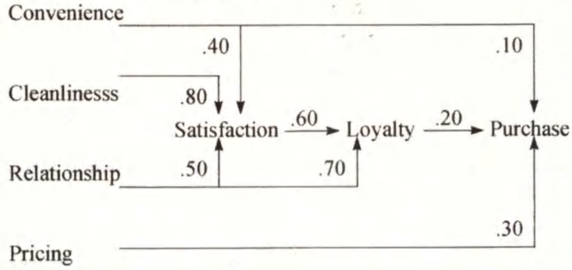
the model to reduce the number of unknowns as shown in Figure 2.

Figure II
Confirmed Relationships



Interpretation

Unconstrained models measure the relative contribution of each factor to desired outcomes such as customer satisfaction, loyalty, and/or purchase. The impact of factors is decomposed into direct and indirect paths. The relative contribution of a factor is calculated by multiplying the beta weights of the indirect paths and aggregating the result with the beta weights of the direct paths as shown in Table 1. In this example, the contribution of Price to purchasing is three times cleanliness, two times convenience, and half again service.

Table 1

Convenience ~.15 = (.40 * .60 * .20) + .10
Cleanliness ~.10 = (.80 * .60 * .20)
Service = .20 = (.50 * .60 * .20) + (.70 * .20)
Price = .30

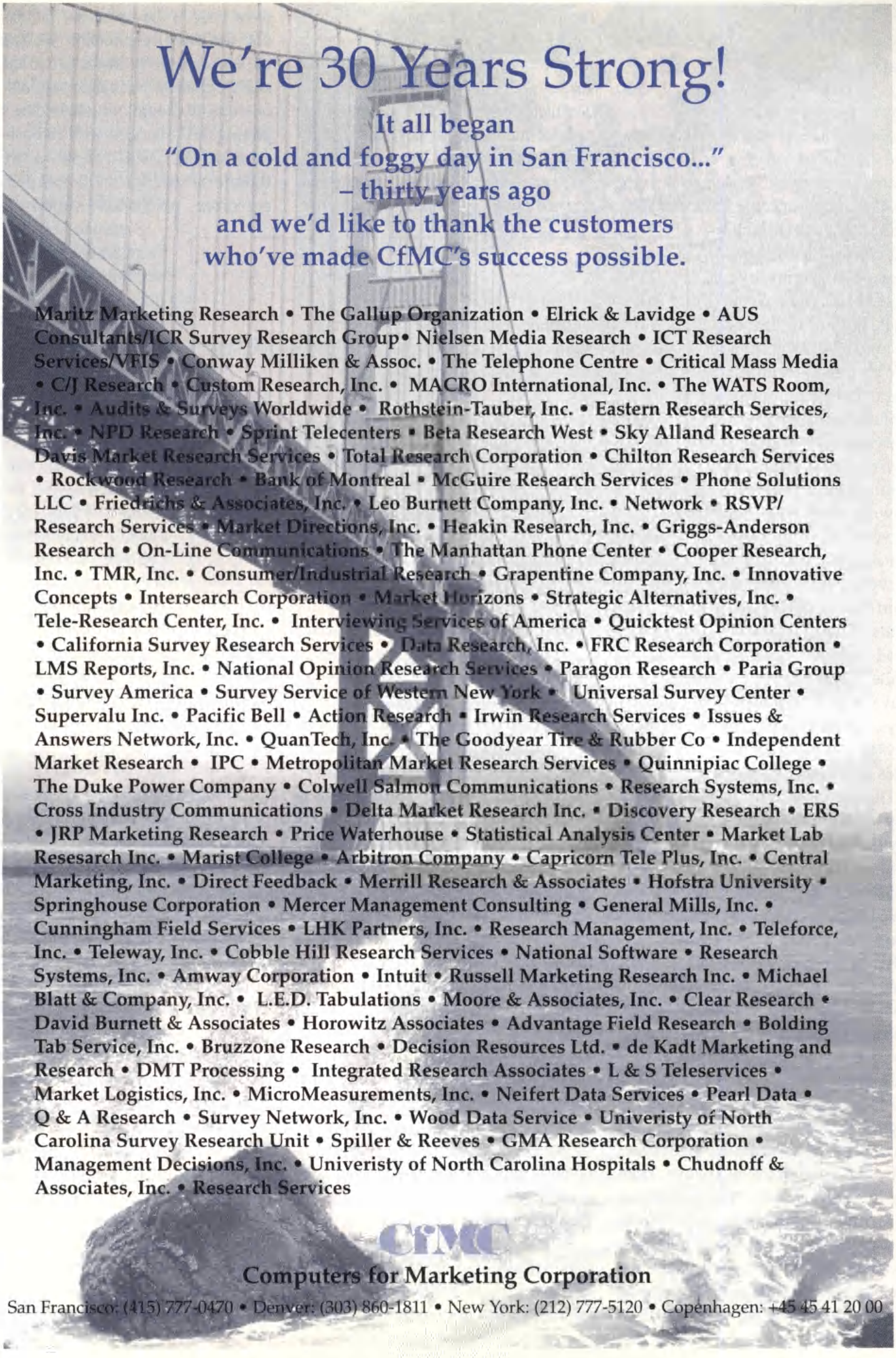
Process

The process is similar for all types of unconstrained modeling:

- measure a battery of factors that may impact desired outcomes;
- hypothesize all possible causal relationships and diagram them;
- convert the diagram into a system of equations;
- solve the equations for the impact of each factor on one another;
- standardize and test the stability of the solution;
- reject hypothesized relationships with a negligible impact;
- confirm the direction and impact of remaining relationships with a diagram;
- calculate the relative impact of each factor on desired outcomes.

Summary

Unconstrained modeling has become a popular technique because it confirms causal relationships without unrealistic assumptions and requirements. Rather than assuming that customer satisfaction funnels through loyalty and repeat purchase, unconstrained modeling allows the data to speak for itself. ❑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Integrated approach

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non-invited Web surfers are unlikely to find it.

Lower response rates

A disadvantage of Web surveys relative to E-mail surveys is lower response rates. This is due to several reasons. First, in some organizations, either because of technical constraints or corporate policy, employees have access to Internet E-mail, but not to the Web. Second, simply getting to a Web survey requires a respondent to follow several steps: clicking on, copying and pasting, or typing in a URL, and waiting for a page to be downloaded from Web server to PC. These steps, not necessary for E-mail surveys, take time and confuse some respondents. Third, respondents generally need to be connected to the Internet while completing a Web survey; they may not be off-line, as with E-mail surveys. For all of these reasons, Web surveys tend to experience lower response rates than E-mail surveys.

The response rate that a Web survey with E-mail invitations will enjoy will depend in part on what percent of the respondents have Web-enabled E-mail clients. A Web-enabled E-mail client is PC E-mail software that allows a user to click on a URL in an E-mail message to view that page on the Web. In contrast, a non-Web-enabled E-mail client requires a respondent manually to copy and paste the URL from the E-mail message to their Web browser to view the Web page. Response rates will be higher for respondents whose E-mail clients are Web-enabled. All recent releases of E-mail software from leaders Microsoft, Netscape, and IBM/Lotus, as well as some 30-40 percent of the E-mail clients currently installed worldwide, we estimate, are Web-enabled. These percentages will rise as users of earlier versions of E-mail software upgrade to newer releases. As this happens, response rates for Web surveys will get closer to those for E-mail surveys.

(To measure the difference in response rates between E-mail and Web surveys, CustomerSat.com recently conducted a test as part of an attendee satisfaction survey for an Internet technology conference. The survey measured attendee satisfaction with the conference program, facilities, meals, registration, city location, and performance relative to other conferences. Approximately 70 percent of the respondents, who were highly Internet-savvy, used Web-enabled E-mail clients. Half of the 600 attendees were surveyed via E-mail, and half via Web surveys with E-mail invitations. The response rate to the 30-question survey, without benefit of pre-notification or reminders, was 24 percent for the Web survey with E-mail invitations, 30 percent for the E-mail survey. We believe the Web survey response rate would have been lower had not such a high percentage of the respondents had Web-enabled E-mail clients.)

Choose E-mail surveys for:
- Shorter surveys (< 20,000 bytes)
- Non-Internet-savvy respondents
- E-mail-based on-line services (e.g., daily news updates)
- Simple skip patterns and edit checking

Choose Web surveys with E-mail invitations for:
- Longer surveys (> 20,000 bytes)
- More Internet-savvy respondents
- Web-based businesses and services (e.g., search engines)
- Complex skip patterns and edit checking

Unwieldy for some

The AMD research used a Web survey with E-mail invitations. The most important factor in the decision was the length of the survey — over 90 questions — which would have made an E-mail survey impossible for some respondents and unwieldy for others.

Being sensitive to response rate issues, we decided to offer respondent incentives for the AMD survey. With an Internet survey, a random drawing for one or more valued items is the simplest form of incentive to manage. That way, only a limited number of incentives need to be awarded, rather than one for every respondent. We wanted the incentive to be attractive to the design engineers, purchasing agents, and other professionals who would be completing the survey, as well as business-oriented. We decided to award two US Robotics PalmPilot hand-held personal organizers, each a $300 value.

Because customers were accustomed to conversing about AMD products and technology in English, we felt comfortable conducting the survey in English worldwide. To assure customers that individual responses would be kept confidential and that data tabulation would be performed objectively, the survey was hosted on CustomerSat.com's Web site. (A copy of the survey questionnaire can be viewed at http://www.CustomerSat.com/amd.htm.) Invitations were sent out, primarily by E-mail, to the customers over a two-week period from AMD's director of customer quality systems.

Questionnaire design

To determine the key performance attributes that the questionnaire would measure, pre-survey interviews were conducted with a sample of AMD customers. The survey covered six major AMD product lines, including microprocessors, non-volatile memory, networking, communications, and programmable logic products, and embedded processors. To make answering the questionnaire easier for respondents, performance attributes were grouped into five categories:

- product quality and effectiveness
- ease of doing business
- support quality and effectiveness
- sales quality and effectiveness
- value and pricing

For marketing purposes, we were interested in what attributes customers believed were most important as well as what attributes actually drove their overall satisfaction and loyalty. So we decided to ask the importance of each attribute explicitly, as well as derive the importance using factor and regression analysis, in order to compare the two. Demographic variables used for cross-tabs included size of customer organization, primary market, type of customer (manufacturer, distributor, or reseller), respondent job function, length of time product(s) has been used, and geographical location.

Results in 30 days

It took less than 30 days to achieve over 200 responses, our targeted number, to the 95-question survey. Respondents included vice presidents and directors of AMD customer companies. During the 30-day period, reminders were sent to respondents as needed by E-mail and voice mail.

In the invitations to the survey, customers were given the choice of responding by Web, E-mail, fax, or postal mail. Ninety-three percent responded via the Web; 7 percent responded by other means. Most of those who responded by means other than the Web were outside of North America, where access to the Web is less widely available. Others worked for companies that restricted or blocked access to the Web. To these customers we either faxed a hard copy of the questionnaire, or E-mailed it as an HTML attachment.

Customers were enthusiastic about the Web survey. Several customers commented on the speed with which the Web survey could be completed. Face-to-face or phone interviews would have required 45-55 minutes of a customer's time; the Web survey could be completed in 12-15 minutes. One of the survey questions asked whether the customer would be willing to be contacted for follow-up probing, if required. Combining the Internet with selective, follow-up probing by phone — pinpointed to the respondent and question — provides the advantages of phone interviews at a lower cost.

"The Web survey process allows us to gather vital data from customers in much less time and at great savings to both AMD and our customers," says Bruce Hicks, AMD director of customer quality systems. "Over time, more and more of our customer satisfaction measurement will shift to the Internet." ❑

Names of Note

continued from p. 20

Several new staff members have joined *Gantz Wiley Research*, Minneapolis: **Carmen Barker Lemay** has been named consultant; **Doreen Caruth**, project coordinator; **Jack Smrekar**, research technician/computer services; **Lori Johnson**, research technician; **Gail Randle**, production assistant; **Kristi Russo**, office manager and administrative assistant to the president; and **Curt Stang**, controller.

Wirthlin Worldwide, McLean, Va., has named **David Richardson** as executive vice president, U.S. Teams; **Richard Kennedy** executive vice president, marketing director; and **John Kennedy** senior vice president and team leader of the firm's New York Team.

Karen Avery has been named senior vice president at *icon & Landis*.

American Opinion Research, Inc., Princeton, N.J., has appointed **Stephanie Foye** as director of research.

Stephen Elson has been named president and chief executive officer of *Pine Company*. Santa Monica, Calif.

Elson

Sabena

Pat Sabena was reelected to a third one-year term as president of the *Qualitative Research Consultants Association*. **Alice Rodgers**, **Suzette deVogelaere** and **Maryanne Pflug** were elected as vice president, secretary and treasurer, respectively. Other newly elected or reelected board members include **Pierre Belisle**, **Lynn Greenberg**, **Judith Langer**, **Gina Thorne** and **Bill Weylock**.

John Minett has joined *The Quantime Corporation* as a sales executive in the New York office.

The Brady Company, Menomonee Falls, Wis., has named **Kathleen Wall** vice president of its research and database services group.

Mark Perline has been named vice president of *BAIGlobal*, Tarrytown, N.Y. In addition, **Eileen Kalminson** has been named assistant vice president of quantitative research; **Barbara Meyer** was promoted to assistant vice president, worldwide services division; and **Roxanne Rossi** was promoted to director of the firm's syndicated services division.

Robert Nascenzi has been named president of *National Decision Systems*, San Diego.

The *Cramer-Krasselt* agency, Milwaukee, Wis., has named **David Brazier** associate research director.

Diane Gamble has joined *Chilton Research Services*, Radnor, Pa., as vice president and group manager for its Information Technology, Computers and Transportation Group. In addition, the firm has promoted **Sheri Lambert**, **Sharon Williams**, **Richard Luker** and **Edythe Twer** to the position of vice president.

Market Segment Research, Miami, has been reorganized into a new business model, under a new name, The MSR Group. As part of the reorganization, the firm has added several new staff members. The MSR Group has named **Victoria Champion** director of client services, **Elcid Choi** director of marketing, **Marilse Rojas** client service manager. Market Segment Research has named **Raul Gonzalez** and **Miguel Martinez** project manager and **Maritza Mendoza** senior research analyst. MSR Consulting has named **Laurence Velcoff** vice president. And **Arlene Wong** has been promoted to executive assistant to the president.

Angelina Villarreal has been named executive vice president and director of research at *Hispanic Market Connections*, Los Altos, Calif.

Burke Inc., Cincinnati, has named **Ron Zussman** account executive. In addition, the firm has promoted **D. Randall Brandt** to senior vice president, director of consulting services.

Zussman

Dysart

Karen Dysart has been appointed national sales manager at *FocusVision Network*, Stamford, Conn. In addition, **Ruth Freedman** and **Kimberly Reardon** have been promoted to senior account director.

Freedman

Reardon

CDB Research & Consulting, New York, has named **Ann Middleman** vice president, director of client services.

Alana Fishman has been named director of marketing research at *Eastbridge Consulting Group, Inc.*, Avon, Conn.

John Robertson, chairman of *Market Facts of Canada*, has retired. **Richard Bennett** was named president and CEO upon Robertson's retirement.

James Ryan has been named president of *Ruf Strategic Solutions*, Olathe, Kan.

Rockwood Research, St. Paul, has added **Steve Blom** as director of sales and **Tia Karelson** as project director.

Switching gears

continued from p. 11

really angry or the really happy customers. With the phone research, we can say to the dealers, these are the voices of your customers telling you what you're doing right and what you're doing wrong so let's talk about your processes and not the sample."

Similar goals

While each manufacturer has its telephone research program tailored to its own needs, the customer interviews have similar goals, says Rich Hebert, president and CEO, Sky Alland Marketing. "All the companies view intimacy with the customer as central to their brand-building strategies and they view us as an extension of their marketing effort."

Tate says that the personal contact offered by a telephone interview fits well into Volkswagen's approach to reaching its prime market — younger, upscale, well-educated car buyers. "What's important to them is the whole sense of connectivity. In that respect, the telephone interviews show them that we're interested in creating a dialog around the sales and service experiences. That gives us a chance to position Volkswagen as different than other car makers."

For a typical interview, which lasts just a few minutes, the Sky Alland representative identifies himself or herself as calling on behalf of the car manufacturer. Customers are thanked for their business, whether it's a car purchase or a visit to the dealer's service department and asked if they were satisfied with their interaction with the dealer. "We always begin with a question that gets top-of-mind responses because that's the most genuine, reliable, actionable and quantifiable information," Hebert says.

From there, customers respond to rating and open-end questions on a variety of service and satisfaction related attributes. "In many cases we ask if the staff expressed appreciation for the customer's business," Hebert says. "We're finding that that's a very important element: Does the marketer demonstrate genuine appreciation for the customer?"

Dealers are notified, usually within 24 hours, of customers who have serious complaints and who wish to be contacted to discuss the matter. For example, interviewers ask Mitsubishi customers who answer negatively on any question if they want to explain what happened, Girard says. "If they say yes, the interviewer will take down the verbatim and then we'll ask if the customer would like the information forwarded to the dealer for follow up. If they say yes, we'll send out a fax to the dealer within 24 hours."

Dealership management receives customized monthly reports for sales people and service advisors, those who usually have the most contact with the customers.

Post-warranty

Hebert says that while it's important to talk to customers after a new car purchase, it's even more crucial to talk to them during the post-warranty period, when they're least loyal. "Service loyalty to the dealer is the greatest determinant of repurchase, so you have to stay close to the customers post-warranty, to make sure they're coming back to your dealers."

In addition, improvements in car quality have lengthened service intervals, giving dealers fewer chances to interact with customers who come in for scheduled maintenance, Tate says. "It's hard to measure how loyal your service customers are because if your cars are performing the way they were designed, you're not going to be seeing the customers as often."

Though many factors influence satisfaction, in the auto industry, like any other service, it comes down to people, Hebert says. "The frontline personnel absolutely govern a consumer's overall perception of the client and their willingness to go back and do more business with them. A frontline person can ruin a good product or overcome a bad one."

Positive measure

Cabanting stresses that a key to dealer buy-in is to not use the satisfaction measurement program as a form of organized punishment. "The biggest challenge is getting the dealers to see it as a positive measure. Some dealers are worried that the manufacturer will use it as a weapon instead of a management tool to give them insight on their business practices and how their staff is treating customers. Once they realize that you are sincere in using it as a positive tool, then some of the apprehension goes away."

For example, in addition to acting on customer complaints uncovered by the research, Porsche also celebrates success stories. When dealer staffers are singled out by customers for delivering excellent service, Porsche presents them with an award and features them in the company newsletter.

Some dealers can get possessive of their customers and worry that the manufacturer will use the research to drive a wedge between the dealership and the customer, Cabanting says. "You have to show the dealers that it's not an us-versus-them situation; the dealer and the manufacturer are a partnership. The marque itself can be tarnished by unsatisfactory sales or service experiences, just as the dealer can, so we have to have a strong partnership to make sure that our mutual customers are satisfied."

Clear hurdle

Another hurdle manufacturers must clear, says Volkswagen's Joe Tate, is dealer skepticism toward the value of satisfaction improvement efforts. "Too often, investments in customer satisfaction are viewed as soft investments; you really can't measure the results of improving it. To a degree it's like advertising. To paraphrase the famous quote, you know about only half of it is effective but you don't know which half. Some of those same emotions surround customer satisfaction. So we wanted to position it as a business result and show them that if they make the investment there are hard results."

Once that leap of faith is made, dealers then want to know exactly when to expect the payoff. "As much as I try to stress the long-term, there are questions like, how long do you have to wait for loyalty to appear? Most car buyers are still financing for four years and they don't have a chance to display loyal behavior until it's time to buy another car," Tate says.

"Car dealers — and the industry has created this situation, because we report sales figures so frequently — are not conditioned to think more than 10 days or 30 days in advance. We're trying to get them to think of share of market or share of customer, and think of the person who will come back and buy three or four more Volkswagens over his car buying life, but they're thinking about the next guy coming through the door.

"We try to tell them that any return that comes from good customer treatment comes for free, because the dealership has already made an investment in its people and its processes, so there's no additional investment necessary. The only thing you have to be sure of is that the processes are performing the way they're designed to. That gives the dealer another way of looking at it: If I hire good people and my processes are sound I should have a good chance at fostering customer loyalty."

Rapid improvements

All of these satisfaction efforts are paying off, Hebert says. "Through the satisfaction programs we conduct for automotive clients, we've seen rapid improvements in the quality of service they're providing. The companies that are expending serious efforts and serious money are seeing tangible improvements in customer satisfaction and customer loyalty.

"A lot of our work involves actively trying to generate loyalty. The manufacturers recognize the connection between satisfaction and loyalty. They also understand that top box satisfaction is the only way to build loyalty. It's not a guarantee but without it you have no shot."

"Everybody wants to measure customer satisfaction," says Mitsubishi's Dan Girard. "But measuring it won't guarantee future loyalty. If you don't have customer satisfaction in this business you'll never have customer loyalty."

Tate says that third-party measures show that Volkswagen is doing significantly better as a result of the Sky Alland telephone process. "From a day-to-day monitoring of the activity that comes through our customer relations lines and through the mail, the trends are positive. Some of that comes from better cars but it's also a much better car buying and owning experience." ❑

Moderator MarketPlace

Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 612-854-5101/ fax 612-854-8191.

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MedProbe, Inc.
Medical Marketing Research, Inc.

BUS.-TO-BUS.

Access Research, Inc.
BAIGlobal Inc.
Brittain Associates
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
Campos Market Research
Consumer Opinion Services
Data & Management Counsel, Inc.
The Deutsch Consultancy
Direct Feedback
Fader & Associates
First Market Research Corp. (Heiman)
Linda Fitzpatrick Rsch. Svcs. Corp.
Pat Henry Market Research, Inc.
Just The Facts, Inc.
Knowledge Systems & Research, Inc.
Market Research Associates
Markinetics, Inc.
MCC Qualitative Consulting
Paul Schneller - Qualitative
SIL: Worldwide Marketing Services
Sunbelt Research Associates, Inc.
Yarnell, Inc.

CABLE

Creative & Response Svces., Inc.

CHILDREN

C&R Research Services, Inc.
Doyle Research Associates
Fader & Associates
Greenleaf Associates, Inc.
Just The Facts, Inc.
KidFacts℠ Research
Macro International
Matrixx Marketing-Research Div.
Outsmart Marketing
Thorne Creative Research

COMMUNICATIONS RESEARCH

Access Research, Inc.
Cambridge Associates, Ltd.
Perception Research Services, Inc.
Performance Research

COMPUTERS HARDWARE

Leichliter Assoc. Mktg. Rsch./Idea Dev.

COMPUTERS/MIS

C&R Research Services, Inc.
Cambridge Associates, Ltd.
Daniel Associates
Fader & Associates
First Market Research Corp. (Heiman)
Greenleaf Associates, Inc.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Marketing Advantage Rsch. Cnslts., Inc.
SIL: Worldwide Marketing Services
James Spanier Associates
Yarnell, Inc.

CONSUMERS

C&R Research Services, Inc.
Consumer Opinion Services
Decision Drivers
The Eisenmann Group
Greenleaf Associates, Inc.
Pat Henry Market Research, Inc.
Just The Facts, Inc.
Knowledge Systems & Research, Inc.
Macro International
Market Research Associates
Marketing Advantage Rsch. Cnslts., Inc.

CORPORATE SPONSORSHIP

Performance Research

CUSTOMER SATISFACTION

BAIGlobal Inc.
David Binder Research
Burr Research/Reinvention Prevention
Elrick and Lavidge
Fader & Associates
guskey & heckman, research consultants
Low + Associates, Inc.
Markinetics, Inc.
Research Data Services, Inc.
Sunbelt Research Associates, Inc.

DIRECT MARKETING

BAIGlobal Inc.
Greenleaf Associates, Inc.
Perception Research Services, Inc.

DISCRETE CHOICE/ CONJOINT

Yarnell, Inc.

DISTRIBUTION

Burr Research/Reinvention Prevention
GraffWorks Marketing Research

EDUCATION

Cambridge Associates, Ltd.
Greenleaf Associates, Inc.
Just The Facts, Inc.
Marketing Advantage Rsch. Cnslts., Inc.

ELECTRONICS

Leichliter Assoc. Mktg. Rsch./Idea Dev.

ENTERTAINMENT

Performance Research

ETHNOGRAPHIC RESEARCH

Alexander + Parker

EXECUTIVES

BAIGlobal Inc.
Brittain Associates
C&R Research Services, Inc.
Decision Drivers
Dolobowsky Qual. Svcs., Inc.
Fader & Associates
First Market Research Corp. (Heiman)
John Fox Marketing Consulting
Marketing Advantage Rsch. Cnslts., Inc.
Paul Schneller - Qualitative
SIL: Worldwide Marketing Services
Strategy Research Corporation

FINANCIAL SERVICES

Jeff Anderson Mktg. Rsch. Consulting
BAIGlobal Inc.
Brittain Associates
Burr Research/Reinvention Prevention
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Cambridge Research, Inc.
The Deutsch Consultancy
Dolobowsky Qual. Svcs., Inc.
Elrick and Lavidge
The Eisenmann Group
Fader & Associates
First Market Research Corp. (Reynolds)
Low + Associates, Inc.
Marketing Matrix, Inc.
Matrixx Marketing-Research Div.
MCC Qualitative Consulting
SIL: Worldwide Marketing Services
James Spanier Associates
Widener-Burrows & Associates, Inc.

FOOD PRODUCTS/ NUTRITION

Alexander + Parker
BAIGlobal Inc.
C&R Research Services, Inc.
CJRobbins
Greenleaf Associates, Inc.
Just The Facts, Inc.
KidFacts℠ Research
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Macro International
The New Marketing Network
Outsmart Marketing
Paul Schneller - Qualitative

HEALTH & BEAUTY PRODUCTS

BAIGlobal Inc.
Qualitative Applied Research
Paul Schneller - Qualitative
Thorne Creative Research

HEALTH CARE

Alexander + Parker
Jeff Anderson Mktg. Rsch. Consulting
David Binder Research
Colburn & Associates
Directions Data Research
Dolobowsky Qual. Svces., Inc.
D/R/S HealthCare Consultants
Elrick and Lavidge
Erlich Transcultural Consultants
The Eisenmann Group
First Market Research Corp. (Reynolds)
Irvine Consulting, Inc.
Knowledge Systems & Research, Inc.
Low + Associates, Inc.
Macro International
Market Access Partners
Market Navigation, Inc.
Market Research Associates
Matrixx Marketing-Research Div.
MedProbe, Inc.
Medical Marketing Research, Inc.
Research Options, Inc.
Spiller & Reeves Research
Strategy Research Corporation
Sunbelt Research Associates, Inc.
Widener-Burrows & Associates, Inc.
Susan M. Williams Rsch. & Disc. USA

HISPANIC

Data & Management Counsel, Inc.
Erlich Transcultural Consultants
Hispanic Market Connections, Inc.
Hispanic Marketing
Communication Research
In Focus Consulting
Market Development, Inc.
Francesca Moscatelli
Strategy Research Corporation
Target Market Research Group, Inc.

HI-TECH
Greenleaf Associates, Inc.
Market Navigation, Inc.
Research Connections, Inc.
Thorne Creative Research

HOUSEHOLD PRODUCTS/CHORES
Paul Schneller - Qualitative

IDEA GENERATION
Analysis Research Ltd.
BAIGlobal Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Dolobowsky Qual. Svcs., Inc.
Doyle Research Associates
Elrick and Lavidge
John Fox Marketing Consulting
Just The Facts, Inc.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Matrixx Marketing-Research Div.
Paul Schneller - Qualitative
SIL: Worldwide Marketing Services

IMAGE STUDIES
Cambridge Associates, Ltd.

INDUSTRIAL
First Market Research Corp. (Heiman)
Market Navigation, Inc.
SIL: Worldwide Marketing Services

INSURANCE
Brittain Associates
Burr Research/Reinvention Prevention
Erlich Transcultural Consultants
Low + Associates, Inc.

INTERACTIVE PROD./ SERVICES/RETAILING
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Perception Research Services, Inc.
Research Connections, Inc.

INTERNET
Knowledge Systems & Research, Inc.
Research Connections, Inc.

INVESTMENTS
The Deutsch Consultancy

LATIN AMERICA
Market Development, Inc.

MEDICAL PROFESSION
Cambridge Associates, Ltd.
Colburn & Associates
D/R/S HealthCare Consultants
Pat Henry Market Research, Inc.
Matrixx Marketing-Research Div.
MedProbe, Inc.
Medical Marketing Research, Inc.
Paul Schneller - Qualitative
Susan M. Williams Rsch. & Disc. USA

MODERATOR TRAINING
Cambridge Associates, Ltd.
Macro International

MULTIMEDIA
Marketing Advantage Rsch. Cnslts., Inc.

NATURAL HEALTH CARE/REMEDIES
Focused Solutions

NEW PRODUCT DEV.
Jeff Anderson Mktg. Rsch. Consulting
BAIGlobal Inc.
Milton I. Brand Marketing Consultant
Brittain Associates
C&R Research Services, Inc.
Cambridge Associates, Ltd.
CJRobbins
Daniel Associates
Data & Management Counsel, Inc.
Dolobowsky Qual. Svcs., Inc.
Doyle Research Associates
Elrick and Lavidge
Fader & Associates
First Market Research Corp. (Heiman)
Greenleaf Associates, Inc.
Kenneth Hollander Associates
Just The Facts, Inc.
KidFacts℠ Research
Bart Kramer & Associates
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Market Access Partners
Market Research Associates
Marketing Advantage Rsch. Cnslts., Inc.
The New Marketing Network
Outsmart Marketing
Qualitative Applied Research
Paul Schneller - Qualitative
Spiller & Reeves Research
Sundberg-Ferar, Inc.

NON-PROFIT
David Binder Research
Doyle Research Associates
Performance Research

OBSERVATIONAL
Doyle Research Associates

ONLINE FOCUS GROUPS
Research Connections, Inc.
Thorne Creative Research

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BAIGlobal Inc.
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CJRobbins
Doyle Research Associates
Just The Facts, Inc.
Market Research Associates
Thorne Creative Research

PACKAGE DESIGN RESEARCH
Treistman & Stark Marketing, Inc.

PACKAGING RESEARCH
Perception Research Services, Inc.

PARENTS
Fader & Associates
Greenleaf Associates, Inc.

PET PRODUCTS
Cambridge Research, Inc.

PHARMACEUTICALS
BAIGlobal Inc.
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Colburn & Associates
D/R/S HealthCare Consultants
Kenneth Hollander Associates
Irvine Consulting, Inc.
Macro International
Market Navigation, Inc.
MCC Qualitative Consulting
MedProbe, Inc.
Medical Marketing Research, Inc.
Paul Schneller - Qualitative
Spiller & Reeves Research
Susan M. Williams Rsch. & Disc. USA

POLITICAL/SOCIAL RESEARCH
Cambridge Associates, Ltd.
Francesca Moscatelli

POSITIONING RESEARCH
Paul Schneller - Qualitative

PUBLIC POLICY RSCH.
David Binder Research
Cambridge Associates, Ltd.

PUBLISHING
Cambridge Associates, Ltd.
The Eisenmann Group
First Market Research Corp. (Heiman)
Greenleaf Associates, Inc.
Marketing Advantage Rsch. Cnslts., Inc.

RETAIL
Pat Henry Market Research, Inc.
Knowledge Systems & Research, Inc.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
MCC Qualitative Consulting

SENIORS
Fader & Associates
Sunbelt Research Associates, Inc.

SERVICES
guskey & heckman, research consultants

SMALL BUSINESS/ ENTREPRENEURS
Brittain Associates
Linda Fitzpatrick Rsch. Svcs. Corp.
Leichliter Assoc. Mktg. Rsch./Idea Dev.
Strategy Research Corporation
Yarnell, Inc.

SOFT DRINKS, BEER, WINE
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Grieco Research Group, Inc.
Strategy Research Corporation

SPORTS
Performance Research
Research Options, Inc.

TEACHERS
Greenleaf Associates, Inc.

TEENAGERS
C&R Research Services, Inc.
Doyle Research Associates
Fader & Associates
KidFacts℠ Research
Matrixx Marketing-Research Div.
MCC Qualitative Consulting
Performance Research
Thorne Creative Research

TELECOMMUNICATIONS
BAIGlobal Inc.
Daniel Associates
Elrick and Lavidge
Erlich Transcultural Consultants
First Market Research Corp. (Heiman)
Knowledge Systems & Research, Inc.
Linda Fitzpatrick Rsch. Svcs. Corp.
Horowitz Associates Inc.
Marketing Advantage Rsch. Cnslts., Inc.
MCC Qualitative Consulting
Qualitative Applied Research
Strategy Research Corporation

TELECONFERENCING
Cambridge Research, Inc.

TELEPHONE FOCUS GROUPS
C&R Research Services, Inc.
Cambridge Associates, Ltd.
Doyle Research Associates
Market Navigation, Inc.
Medical Marketing Research, Inc.
MedProbe, Inc.

TOURISM/HOSPITALITY
Research Data Services, Inc.

TOYS/GAMES
Fader & Associates
Greenleaf Associates, Inc.
KidFacts℠ Research

TRANSPORTATION SERVICES
Low + Associates, Inc.
Markinetics, Inc.
SIL: Worldwide Marketing Services
Strategic Focus, Inc.

TRAVEL
Cambridge Associates, Ltd.
Greenleaf Associates, Inc.
Performance Research
Research Data Services, Inc.
SIL: Worldwide Marketing Services
James Spanier Associates

UTILITIES
Cambridge Associates, Ltd.
Fader & Associates
Knowledge Systems & Research, Inc.

WEALTHY
Brittain Associates
The Deutsch Consultancy
Strategy Research Corporation

YOUTH
Fader & Associates
Macro International
Outsmart Marketing

Research Industry News

continued from p. 21

offices in Miami and Dallas. Jacques Malaguti and Laura Bright will manage the Miami office. Carey McMann will manage the Dallas office. The company has also expanded its San Francisco office.

Market Facts, Inc., Arlington Heights, Ill., has acquired BAIGlobal, Inc., Tarrytown, N.Y. In other news, Market Facts has also opened a new office at Two Embarcadero Center in San Francisco. The new office is headed by Tim Gaughan.

Marketing Workshop, Inc., an Atlanta-based research firm, has received a certificate of excellence in the 1997 American Marketing Association "AMY" awards. The award, in the category of Best Regional Business Advertising, was for the firm's Leonardo da Vinci print ad series.

MRCFocus, a Las Vegas research firm, has added a new telephone interviewing facility. For more information call 702-734-7511.

Markinetics Inc., a Marietta, Ohio, research firm, has opened a new call center. For more information call 614-374-6615.

Market Access Partners, Golden, Colo., has opened a Web site at http://www.marketaccesspartners.com.

ACNielsen Corp., Stamford, Conn., has reached separate agreements with Eckerd Corp. and American Stores Co. to acquire each retailer's all-store, census-level sales data and create customized trading areas for each of their stores.

Alliance Research, Inc., Crestview Hills, Ky., has opened a client service office at 1010 Huntcliff, Ste. 1350, Atlanta, Ga., 30350. R. Bruce Westcott, senior vice president, and Joseph Ferris, vice president, will develop and manage the office. Phone 770-587-6311. Fax 770-587-6312.

Quality Controlled Services, St. Louis, has opened a branch office in Seattle. Donna Glosser will serve as senior branch manager.

InterActive Research Corp. has moved to 2500 Windy Ridge Parkway, Ste. 1270, Atlanta, Ga., 30339. Phone 770-818-0060. Fax 770-818-0069.

SPSS Inc., Chicago, has formed a partnership with Luftig & Warren International, quality consultants headquartered in Southfield, Mich.

Jeffrey Hine has established **J. Hine & Associates, Inc.**, a new full-service research firm, at 2301 Barberry Court, Waukesha, Wis , 53188. Phone 414-896-9009. Fax 414-896-9779.

HR and Associates, a research firm based in Clarendon Hills, Ill., has opened a Web site at http://www.hrandassociates.com.

Disher Strategic Research, Cincinnati, has opened a Web site at http://www.disher.com.

Gallup & Robinson, Inc., has moved to 24 N. Main St., Pennington, N.J., 08534-2296. Phone 609-730-1550. Fax 609-730-1566.

Colwell and Salmon Communications, an Albany, N.Y., research and telephone marketing firm, has expanded its headquarters.

The Minneapolis office of **Maritz Marketing Research Inc.** has moved to 7701 France Ave. So., Ste. 300, Minneapolis, Minn., 55435. Phone 612-841-2400. Fax 612-841-2424.

FocusVision Network Inc., Stamford, Conn., has established international service in the U.K. and Western Europe. European partners with focus group studios equipped with FocusVision technology for videoconferencing focus groups include: Field Facts International in London, Paris and Frankfurt; MR&S in Frankfurt; MV2 Counseil and NovaTest in Paris; CIRM in Milan; Pragma in Rome; and INNER in Madrid.

Cardiff Software, Inc., San Marcos, Calif., a maker of automated data collection products, has announced a licensing agreement with Siemens ElectroCom L.P., a supplier of mail sorting and address recognition systems. Cardiff Software will include a custom version of Siemens ElectroCom's AEG Recognition engine in Tri-CR, the character identification process that provides recognition in TELEform Elite and TELEform Standard forms processing software.

Creative Data, a Van Nuys, Calif., has remodeled its qualitative research facility, which now features large viewing rooms with tiered seating with one-way mirrors, three large conference rooms and state-of-the-art audio, video and closed-circuit TV capabilities.

Van Nuys, Calif.-based **Interviewing Service of America** has opened a new telephone research facility in Alhambra, Calif. The facility has 60 CATI positions, bringing ISA's capacity to 260 telephones using C-SURVENT.

Mark Jeffery and Mary Assimakopoulos have left Isis Research to form their own company, **The Research Partnership**, at 41 Overstone Rd., London W6 0AD, England. Phone 44-181-741-1030. Fax 44-181-741-1140.

The Green Group, a Troy, Mich., market analysis firm, has moved to 3250 West Big Beaver Rd., Ste. 526, Troy, Mich., 48084-2902. Phone 248-637-3199. Fax 248-637-3473.

Walker Information, Indianapolis, has changed the names of subsidiaries in Canada and Mexico. Elliott Research is now Walker Information Canada and Grupo Walker is now Walker Information Mexico.

1997

Customer Satisfaction Directory

This directory was compiled by sending listing forms to companies we identified as active marketers of their customer satisfaction research services.

ACA Research Pty Ltd
Level 5, 121 Walker Street
North Sydney, NSW 2060
Australia
Ph. 61-2-9955-1966
Fax 61-2-9955-6293
Andrew Aitken, Research Director

ACG RESEARCH SOLUTIONS

ACG Research Solutions
Pierre Laclede Center
7701 Forsyth, Ste. 1100
St. Louis, MO 63105
Ph. 314-726-3403
Fax 314-726-2503
http://www.AragonConsulting.com
Vicki Savala, President

ACG Research Solutions, a full-service market research company, provides clients with customer satisfaction/loyalty studies using a proprietary model. Our data center includes 40 computer equipped stations using Ci3 CATI software. Our qualitative capabilities include experienced moderators on staff and a state-of-the-art focus group facility. In addition, we offer clients wireless interactive audience measurement studies.
(See advertisement on p. 78)

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Old Greenwich, CT 06870
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Fax 203-637-8569
E-mail: ASISAMPLING@compuserve.com

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(See advertisement on p. 80)

Alliance Research, Inc.
2845 Chancellor Dr.
Crestview Hills, KY 41017
Ph. 606-344-0077
Fax 606-344-0078
E-mail: clint@allianceresearch.com
http://www.allianceresearch.com
Clint Brown, President

Applied Decision Analysis, Inc.
2710 Sand Hill Rd.
Menlo Park, CA 94025
Ph. 415-854-7101
Fax 415-854-6233
E-mail: lweber@adainc.com
Lynne Weber, Principal

Applied Marketing Research, Inc.
6750 West 93rd Street, Ste. 220
Overland Park, KS 66212
Ph. 913-381-5599
Fax 913-381-9444
E-mail: dphipps@appliedmktresearch.com
Donald Phipps, Principal

ASECOM S.A. - Mktg. Research & Consulting
Av. Cordoba 1345, piso 8
1055 Buenos Aires
Argentina
Ph. 54-1-815-1499
Fax 54-1-812-1662
E-mail: research@asecom.com.ar
http://www.asecom.com.ar
Jorge Garcia-Gonzalez, President

HISPANIC & ASIAN MARKETING COMMUNICATION RESEARCH, INC.

Asian Marketing Communication Research
Hispanic & Asian Marketing Comm. Research, Inc.
1301 Shoreway Rd., Ste. 100
Belmont, CA 94002
Ph. 650-595-5028
Fax 650-595-5407
E-mail: gateway@hamcr.com
http://www.hamcr.com
Sandra M.J. Wong, Ph.D., ResearchDirector

Asian consumer satisfaction research using a Psycho-socio-cultural© approach. Full-service qualitative and quantitative research in most Asian languages, assessing external and internal customer satisfaction (CS) and needs for the Asian and general markets. CS services include: surveys, interviews, focus groups, benchmarking, tracking studies, employee opinion studies, and organizational assessments. Highly qualified bilingual researchers. Telephone bank with CATI capability.
(See advertisement on p. 53)

Aspen Systems Corporation
2277 Research Blvd.
Rockville, MD 20850
Ph. 301-519-5000
Fax 301-519-5885
E-mail: pmcarthy@aspensys.com
http://www.aspensys.com
Patrick McCarthy, Vice President

Attitude Measurement Corporation
75 James Way, 2nd fl.
Southampton, PA 18966
Ph. 215-364-1440
Fax 215-364-3912
E-mail: AMC@amcglobal.com
Raymond P. Roshkoff, President

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650 Avenue of the Americas
New York, NY 10011
Ph. 212-627-9700 or 800-274-3577
Fax 212-627-2034
E-mail: cravitch@surveys.com
http://www.surveys.com
Carl Ravitch, Exec. V.P. Mktg.

ASW is a marketing research firm offering commercial, industrial, technology, financial, legal, institutional, governmental and academic clients in more than 70 countries a wide variety of syndicated and custom services. Services include: customer satisfaction studies, measurement of retail sales, product or service distribution, test marketing, in-store promotion testing, consumer and industrial surveys, technology audits and surveys and media, financial and public opinion research.
(See advertisement on p. 79)

Austin Trends
7101 Hwy. 71 W., Ste. 213
Austin, TX 78735
Ph. 512-288-8501
Fax 512-288-8521
E-mail: TJUKAM@smart1.net
Tom Jukam, President

BAIGlobal Inc.
580 White Plains Rd.
Tarrytown, NY 10591
Ph. 914-332-5300 or 914-332-5454
Fax 914-631-8300
E-mail: kpermut@baiglobal.com
http://www.baiglobal.com
Kate Permut, V.P. Marketing

Barbour Research, Inc.
5241 Southwyck Blvd., Ste. 201
Toledo, OH 43614
Ph. 419-866-3475
Fax 419-866-3478
E-mail: BARBOUREK@aol.com
Emily Barbour, President

Bay Area Research
9936 Liberty Rd.
Randallstown, MD 21133
Ph. 410-922-6600
Fax 410-922-6675
E-mail: baya@erols.com
Tamara Zwingelberg, President

Bellomy Research, Inc.
2150 Country Club Rd., Ste. 300
Winston-Salem, NC 27104
Ph. 800-443-7344
Fax 910-721-1597
E-mail: bellomy@interpath.com
Lacy Bellomy, President

Berkey Research
9310 Carmel Mountain Rd., Ste. D
San Diego, CA 92129
Ph. 619-538-5920
Fax 619-538-5996
E-mail: CBERKEY@compuserve.com
Cheryl Berkey, Owner

BestMark

BestMark
4915 W. 35 St., Ste. 206
Minneapolis, MN 55416
Ph. 612-922-2205
Fax 612-922-0237
http://www.bestmark.com
Ann Jennings, President/CEO

BestMark is a full-service national market research company specializing in building customer value and loyalty through on-site and telephone mystery shopping. Specializing in "Real Time" Internet reports and results reporting. BestMark provides hard, actionable data and proven management solutions for many of America's leading companies, including Fortune 500 companies. Founded in 1986, the company operates throughout the U.S. and Canada and offers customized survey forms and analysis reporting for all industries from hospitality to automotive, lending institutions to retailers. BestMark offers an array of additional services including customer satisfaction studies, loyalty positioning, comment card management, incentive/recognition programs and internal/competitive benchmarking. The BestMark Solution can help improve your products, services and business practices for increased revenues. No matter what sort of customer you serve, BestMark is the one mystery shopping company that positions you for loyalty results.
(See advertisement on p. 9)

Better Marketing Associates, Inc.
P.O. Box 190
Oaks, PA 19456
Ph. 800-355-5040
Fax 610-933-6071
E-mail: bma1@enter.net
Peter Thorwarth, President

David Binder Research
44 Page St., #401
San Francisco, CA 94102
Ph. 415-621-7655
Fax 415-621-7663
E-mail: DBRESEARCH@aol.com
http://www.internetics.com/dbr.html
Julie Cedrone, Dir. Qual. Rsch.

Gordon S. Black Corp.
135 Corporate Woods
Rochester, NY 14623-1457
Ph. 716-272-8400 or 800-866-7655
Fax 716-272-8680
Robert C. Kallstrand, V.P. Research

The Blackstone Group
360 N. Michigan Ave., Ste. 1500
Chicago, IL 60601
Ph. 312-419-0400
Fax 312-419-8419
Ashref Hashim, President

Bosma & Associates Int'l., Inc.
1111 Third Ave., Ste. 2500
Seattle, WA 98101
Ph. 800-377-2945
Fax 800-377-0866
E-mail: JohnB@Bosma-Associates.com

Burke

Burke Customer Satisfaction Associates
805 Central Ave.
Cincinnati, OH 45202
Ph. 800-264-9970
Fax 513-684-7717
E-mail: rod@burke.com
http://www.burke.com
Rod Cober, Sr. V.P., Gen. Mgr.

Burke CSA works with clients to develop measurement and management processes for "closing the loop" with customers to create long-term customer value, loyalty and improved business performance. Burke CSA allows companies to see their performance through their customers' perspective to ensure long-term productivity and profitability. For more information visit our Web site at http://www.burke.com.
(See advertisement on p. 81)

Burr Research/Reinvention Prevention
4760 Fremont St.
Bellingham, WA 98226
Ph. 360-671-7813
Fax 360-671-7813
E-mail: BURRRESEARCH@aol.com
Robert L. Burr, Principal

The Business Research Lab
255 Oser Ave.
Hauppauge, NY 11788
Ph. 888-557-5263
Fax 516-435-3287
E-mail: corporate@netropolis.net
http://www.busreslab.com
Stewart Goldberg, Managing Partner

Business Science International, Inc.
270 Sylvan Ave.
Englewood Cliffs, NJ 07632
Ph. 201-871-0999
Fax 201-871-8757
E-mail: mail@bsiresearch.com
http://www.bsiresearch.com
Peter S. Karp, President

C&R RESEARCH

C&R Research Services, Inc.
Creative & Response Research Services, Inc.
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Chicago, IL 60611
Ph. 312-828-9200
Fax 312-527-3113
E-mail: info@crresearch.com
http://www.crresearch.com
Jim Flannery, Dir. Business Development

C&R Research Services, Inc. is a full-service custom research and consulting company with 202 full-time employees including 34 project directors/analysts. C&R provides customer satisfaction, strategic studies, new product development, brand imagery and positioning research, concept and advertising testing, research among children (KidSpeak), and concept development using a panel of highly creative individuals (Idea Team) as well as multi-media PC interviewing (CRIMSON). C&R conducts approximately 1,000 group interviews a year, 1.7 million mail, telephone and mall intercept interviews.
(See advertisement on back cover)

Capstone Research, Inc.
623 Ridge Rd.
Lyndhurst, NJ 07071
Ph. 201-939-0600
Fax 201-939-3037
E-mail: info@capstoneresearch.com
http://www.capstoneresearch.com
Harriet Gozali, Vice President

Chilton Research Services
201 King of Prussia Rd.
Radnor, PA 19089-0193
Ph. 610-964-4600 or 610-964-4694
Fax 610-964-2904/2942
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http://research.chilton.net
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Fax 417-890-8259
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Randy Young, President

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(See advertisement on p. 82)

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Clearwater Research, Inc.
2136 N. Cole Rd.
Boise, ID 83704
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Fax 208-376-2008
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(See advertisement on p. 83)

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Albany, NY 12205
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Minneapolis, MN 55402
Ph. 612-340-1148
Fax 612-340-1067
E-mail: mgr@cciresearch.com
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Birmingham, MI 48009
Ph. 800-336-0159
Fax 810-645-5685
E-mail: consumer.pulse@internetMCI.com
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E-mail: consresp@carroll.com
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Universal City Professional Bldg.
Chicago, IL 60617-4734
Ph. 800-882-1983 or 773-233-0481
Fax 773-233-0484
E-mail: crms1@aol.com
Cherlyn Robinson, Project Coordinator

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Ph. 770-246-0298
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E-mail: crsatlanta@aol.com
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CustomerSat.com (Menlo Park, CA) is the premier provider of customer satisfaction and loyalty measurement and marketing research using the Internet: E-mail, the Web, and combinations thereof. With constantly advancing, leading-edge technology, we have conducted E-mail surveys since 1993 and Web surveys since 1995. We are experts at delivering fast results, achieving high response rates, ensuring positive respondent identification, and displaying survey results in real-time. Phone 650-234-8000; E-mail expert@CustomerSat.com; http://www.CustomerSat.com.
(See advertisement on p. 57)

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La Grange, KY 40031
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Fax 502-222-6693
Rebekah L. Ashcraft, Owner

DALBAR, Inc.
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Ph. 617-723-6400
Fax 617-624-7200
E-mail: info@dalbar.com
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Fax 972-239-5613
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E-mail: WKTRIPP5@aol.com
http://www.dmchome.com
Bill Tripp, Managing Director

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Ph. 847-647-6678
Fax 847-647-6821
E-mail: dlcdata@aol.com
M.V. Girardi, President

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Minnetonka, MN 55345
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Fax 612-935-1435
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(See advertisement on p. 85)

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Fax 703-356-1680
Gary Brown, Executive Vice President

Decision Diagnostics, Inc.
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Evanston, IL 60201-4618
Ph. 847-492-1583
Fax 847-492-1584
E-mail: aswhitedd@worldnet.att.net
Alvah White, President

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Ph. 800-544-2115
Fax 305-665-5168
Howard Waddell, President

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Paul Weener, President

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San Diego, CA 92108
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Fax 619-299-5888
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David Phife, President

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Linda Hu, Fielding Director

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Fax 562-495-0349
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http://www.farrandresearch.com
Tom Farrand, President

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Customer Satisfaction and Loyalty Group
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Ph. 212-807-2766
Fax 212-807-2688
E-mail: ssigaud@findsvp.com
http://www.findsvp.com
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Ann Garbarino, Marketing Director

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Puerto Rico
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Fax 787-728-5715
E-mail: gaither@tld.net
David W. Whitehouse, V.P. Custom Rsch.

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Fax 612-342-2922
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Stephanie Kendall, Dir. Service Quality Rsch.

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Jeffrey S. Green, President

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Dr. Audrey Guskey

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Dr. Robert Heckman

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John Bonsall, Mgr. of Focus Groups

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Fax 201-342-1709
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(See advertisement on p. 53)

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http://www.hrandassociates.com
Daphne Davis, Vice President

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United Kingdom
Ph. 44-181-341-1257
Fax 44-181-341-9973
E-mail: hrheidi@aol.com
http://www.hrandassociates.com
Heidi Racker, Managing Director

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(See advertisement on p. 61)

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(See advertisement on p. 47, 49, 51)

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United Kingdom
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Fax 44-181-297-1227
E-mail: info@irb.co.uk
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David Burkitt

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Austin, TX 78746
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Ursula Talley, Dir. of Mktg. Comm.

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Riley Kirby, President

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Carla Lindemann, Exec. Vice President

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http://members.aol.com/Ja4steel
Paul Cupo, Vice President

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Fax 214-361-9715
E-mail: jfasurvey@attmail.com
John Bassler, Dir. Survey Services

JRP Marketing Research Services
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Fax 610-565-8870
Paul R. Frattaroli, President

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Owen Jenkins, CEO

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Simon Everard, Managing Director

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Fax 612-854-6869
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Stephen Kingsley, President

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Lynnette Van Dyke, Dir. of Market Svcs.

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Ed Kubba, President

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19 W. 44th St., Ste. 1600
New York, NY 10036
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Fax 212-391-0357
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Judith Langer, President

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Barry Leeds & Associates, Inc.
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(See advertisement on p. 86)

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Canada
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http://www.leger-leger.qc.ca
Jean Marc Leger, President

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Phoenix, AZ 85021
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Fax 602-906-9424
E-mail: low-assoc@worldnet.att.net
http://www.lowassociates.com
Cherie M. Scallion, Project Coordinator

Low + Associates, Inc.
5454 Wisconsin Ave., Ste. 1300
Chevy Chase, MD 20815-6994
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Ph. 49-681-954140
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New York, NY 10013
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E-mail: madenberg@msn.com
Douglas I. Madenberg, Principal

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(See advertisement on p. 89)

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(P O Box 214)
Miranda, NSW 2228
Australia
Ph. 61-2-9525-3200
Fax 61-2-9525-3656
David Collins

Market Development Associates, Inc.
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Memphis, TN 38157
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E-mail: Mktdevlp@aol.com
http://www.MDARESEARCH.com
John H. Choate, President

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Milwaukee, WI 53226-1310
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(See advertisement on p. 88)

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Myles Kelly, Principal

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Steven Levitt, President

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St. Louis, MO 63146
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Fax 314-432-7014
E-mail: mhorizons@stlnet.com
Stephanie Feeney, Dir. of Field Svcs.

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(See advertisement on p. 90)

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Ph. 201-540-9133
Fax 201-540-9280
E-mail: MarkSolut@aol.com
Michael Moskowitz, President

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Fax 757-229-1828
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(See advertisement on p. 90)

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Donna Coleman, Exec. Dir., Client Svcs.

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On p. 234, the E-mail address for BAIGlobal should read: kpermut@baiglobal.**com**.

On p. 269, the Web address for Disher Strategic Research should read: **http://www.disher.com**.

On p. 305, the fax number for Common Knowledge, Inc. should read: 972-**7**32-1447.

On p. 306, the contact name for Intelemedia Communications should read: Jim H**a**wkins, V.P. Sales.

On p. 312, the E-mail address for Quest Research should read: research@**t**qba.com.

On p. 334, the listing for ASECOM S.A. should read: ASECOM S.A. - Mktg. Resea**r**ch & Consulting.

On p. 348, the listing for Instituto Doxa should read: **Istituto** Doxa. The postal code should read: **20144**.

On p. 348, the listing for MAP Agency for Marketing Analyses & Plans should read:
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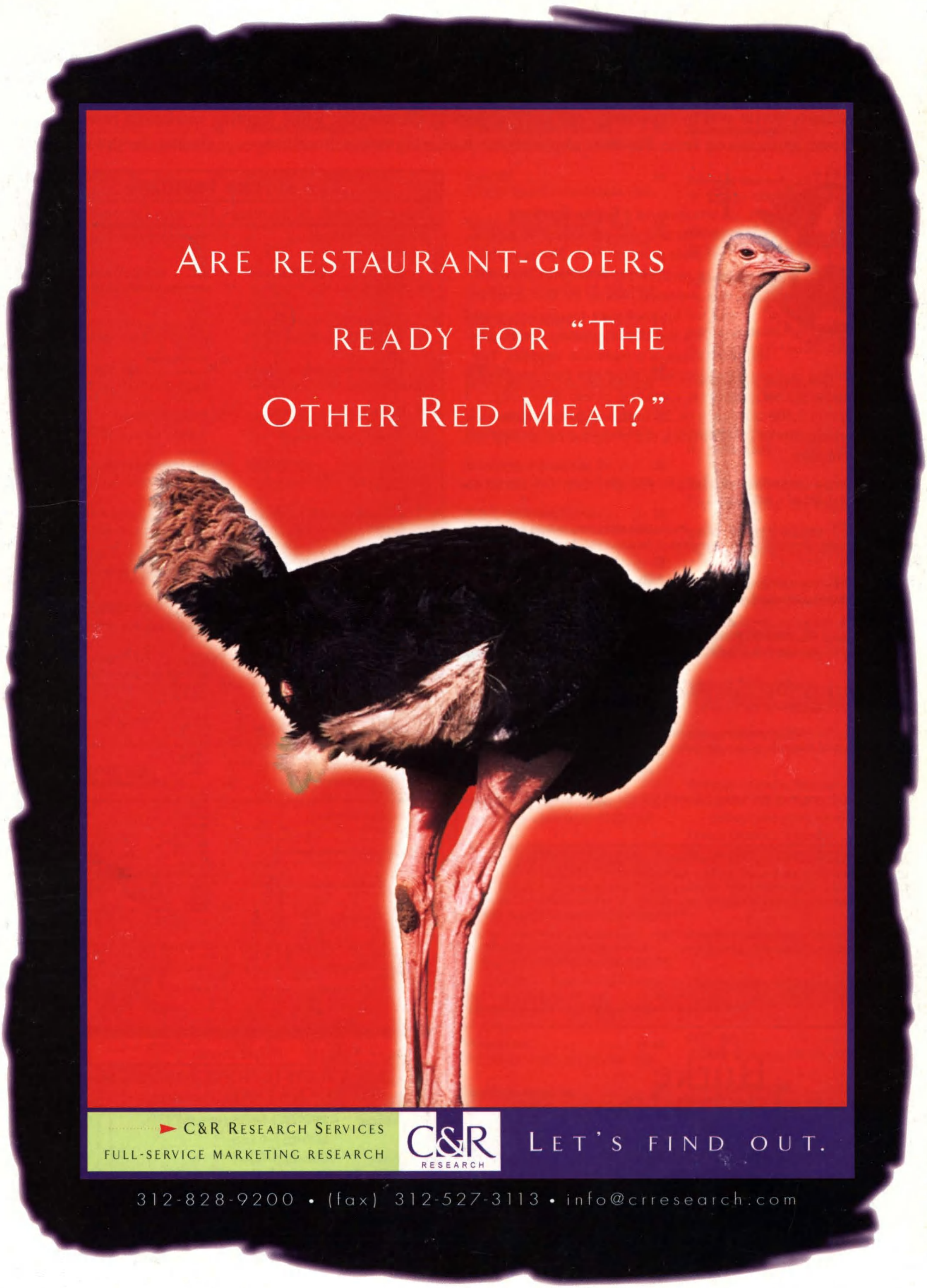
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