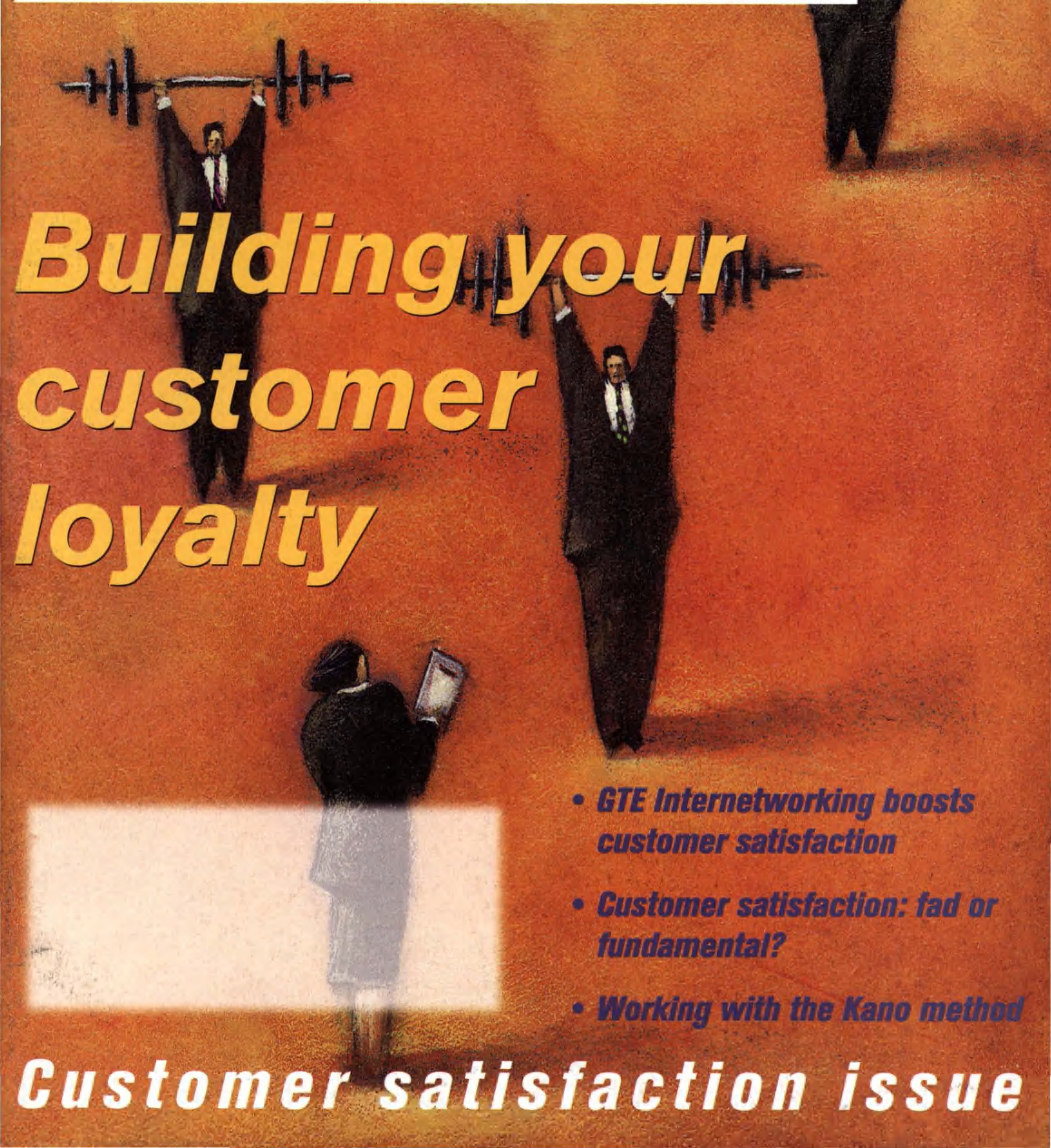
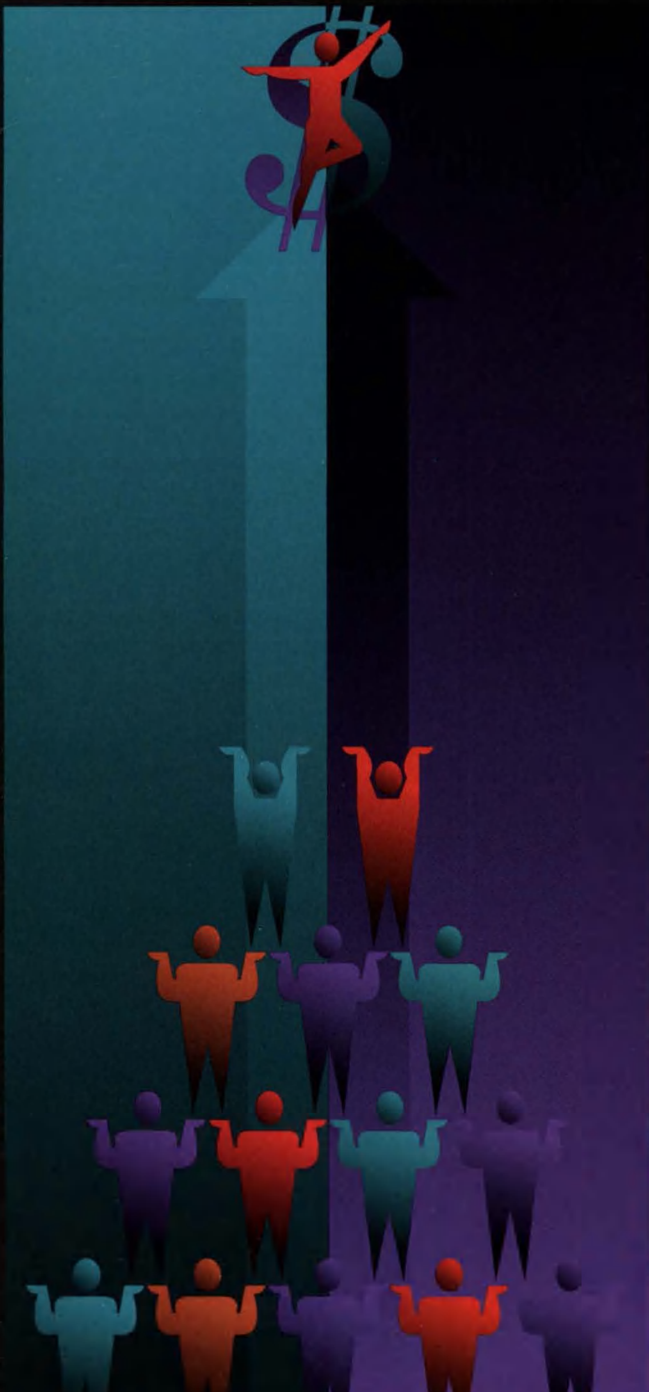
QUIRK'S
Marketing Research Review

Volume XII, Number 9

October 1998



HELPING YOU BUILD—AND MEASURE—RELATIONSHIPS



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Quirk's Marketing Research Review, (ISSN 08937451) is issued 11 times per year – Jan., Feb., Mar., Apr., May, June, July, 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) $70; Canada and Mexico rate $100 (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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Editorial policy: We invite submission of manuscripts from outside sources. Write or call for guidelines. Send press releases and other editorial material to Joseph Rydholm, editor. We reserve the right to edit any manuscript.

Reprints: For information on article reprints, please call Reprint Management Services at 717-560-2001.

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Executives suffering from 'meeting-itis'

Despite the widespread use of e-mail in North American companies, nearly half (45 percent) of executives claim they attend too many meetings each week, according to the Cross Executive Communications Survey conducted by the Pen Computing Group of A.T. Cross Company.

According to the survey of 400 executives, which assessed the impact of technology on communications, one-fifth (20 percent) of the respondents said they attend 11 or more meetings a week.

A large majority (82 percent) share their meeting notes with others in the company. Most distribute their meeting notes via e-mail (77 percent), paper interoffice correspondence (45 percent), fax (18 percent), and ironically, through additional meetings (31 percent).

Regarding e-mail usage, while one-third (34 percent) of the respondents disagree that e-mail has reduced the need for meetings, the vast majority (91 percent) say that e-mail has, in fact, reduced the need for paper correspondence. More than three-quarters (76 percent) say e-mail has reduced the need to speak by telephone. Virtually all (91 percent) say e-mail has improved productivity overall. However, nearly 30 percent said they would find e-mail more productive if they could type better, and 80 percent say they wish they could e-mail sketches or hand drawings.

While information sharing (notes, sketches, diagrams, charts) from meetings is pervasive within the organization, 60 percent of the respondents claim they take "spotty" notes, 6 percent said they take notes to make it look like they're listening and only 20 percent say they "jot down everything." Nearly half the Cross Survey respondents (47 percent) admit they have trouble reading their handwriting.

The survey reveals that few respondents record their meeting information digitally. Only 4 percent use digital devices such as laptop or hand-held computers or PDAs exclusively to take notes. Nearly one-quarter (23 percent) use a combination of paper and digital devices, while the vast majority (72 percent) still use paper notepads to take notes.

The Cross Executive Communications Survey includes executives from a broad spectrum of North American businesses. Questionnaires were distributed by mail during April 1998. The survey is based on 400 responses received from a total mailing to 2,500 names randomly selected by computer - a 16 percent response rate. The survey was conducted by A. Lavin Communications, a communications research firm retained by the Cross Pen Computing Group. For more information on the study contact Andrew Lavin at 212-354-2266 or mail@alavin.com.

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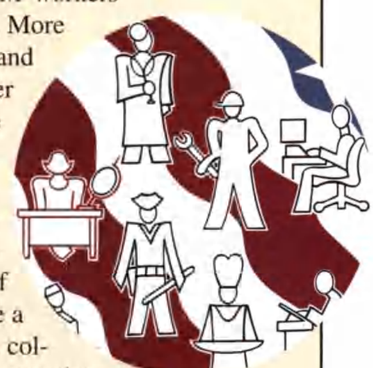
Unions strike out with American public

Could labor unions actually be a detriment to the ability of U.S. businesses to compete in the global marketplace? Half of adult Americans think so, according to a survey by Wirthlin Worldwide, Grand Rapids, Mich. Fifty-two percent of respondents agree that "Unions today are too disruptive to business and industry and make it harder for U.S. companies to do business." Given that the survey was conducted three weeks into the recent strike against General Motors, which idled some 200,000 GM workers and their suppliers, this may not be surprising. More older Americans (62 percent of those age 55 and older) believe unions are disruptive, while fewer (49 percent) of those under 55 agree. Whites are more prone to this view (56 percent) than are ethnic minorities (39 percent).



Half of those surveyed (48 percent) feel the union's role in protecting workers is less important today than in the past — and 26 percent of the respondents who are union members or have a member in their household agree. People with college educations and higher than average incomes are the least likely to defend the importance of unions. Nor do most respondents believe union workers are better workers. Only 27 percent agree that "union workers are better trained and do a better job than non-union workers," while four in 10 strongly disagree. (Employers, on the other hand, generally feel that union-trained workers are better-trained, better-quality workers, according to previous Wirthlin research.)

One area where unions may have scored a great victory is convincing the American public that U.S. companies should not expand in other countries at the cost of American jobs. A remarkable 63 percent of respondents say that a U.S. company should not be able to replace American workers with foreign workers, even when that is the only way the company can stay competitive and profitable. Three in 10 believe a U.S. company should never be allowed to build new plants and hire workers outside the U.S. — regardless of how desperate the company is to be globally competitive. For more information call 616-954-0200 or visit the company's Web site at www.wirthlin.com.

Philadelphia firm offers multiple response tracking system

Group Dynamics in Focus, Bala Cynwyd, Pa., now offers View Trac, a response tracking system. The View Trac response tracking system equips every respondent with an input device that allows feedback in three different forms. A computer program records reactions instantly. Group Dynamics in Focus is the only East Coast market research facility equipped and certified to operate this system. The technology has many applications, says Merle Holman, Group Dynamics in Focus president. "They range from actual products and product concepts, to media previews and infomercial response testing. The applications extend to political candidates testing content and image, to attorneys and mock juries, to personnel interviews and evaluations, to any business situation where participants have found themselves unable to document meaningful reactions. And this system can be used in a variety of testing environments — one-to-ones, focus groups or theater-like settings." For more information call Merle Holman at 610-668-8535 or visit the company's Web site at www.groupdynamics.com.

Columbia updates Perception Analyzer

Columbia Information Systems, Portland, Ore., has released WinPA Version 5.3, a new version of its Perception Analyzer system. By providing new ways to summarize

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Research Calendar

SEGMENTATION CONFERENCE: The SCOPE '98: Customer Segmentation for Profitable Growth conference and workshops will be held on October 25-28 at the Marriott Camelback Resort in Scottsdale, Ariz. Keynote presenter David Andrews of British Telecom will speak on using segmentation results to drive organizational change. For more information visit the Institute for International Research Web site at www.iir-ny.com or e-mail SCOPE98@NIKONET.COM.

MRA EDUCATION CONFERENCE: The Marketing Research Association will hold its fall education conference on November 4-6 at the Wyndham Emerald Plaza Hotel in San Diego, Calif. Themed "Winds of Change: 20/20 Foresight," the conference offers 24 workshops designed to help attendees develop skills and learn about available research tools. A Technology Forum will showcase 35 technology providers whose products and services are used in market research. For more information call 860-257-4008 or visit the MRA Web site at www.mra-net.org.

QUALITY CONTROL AND STABILITY TESTING WORKSHOP: Tragon Corp., a Palo Alto, Calif., research firm, will conduct a workshop entitled "Quality Control and Stability Testing" from November 9-11. The workshop includes topics such as: organizational approaches to establishing product quality monitoring systems within manufacturing and R&D; and methods for measuring product quality and stability, including design and analysis. The program will be held in Palo Alto. For more information call 650-365-1833.

INSURANCE RESEARCH CONFERENCE: The Society of Insurance Research will hold its annual conference and business meeting on November 15-18 at the Charleston Place Hotel, Charleston, S.C. Exhibits will be included. For more information call Stanley Hopp at 770-426-9270.

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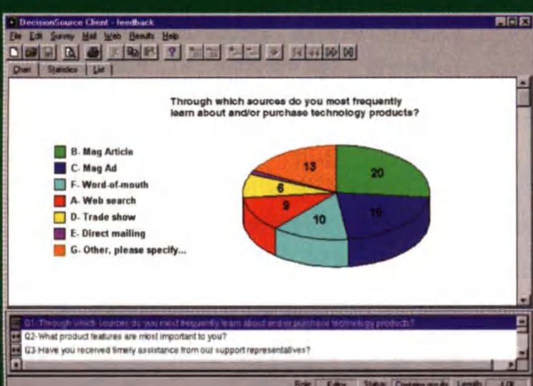

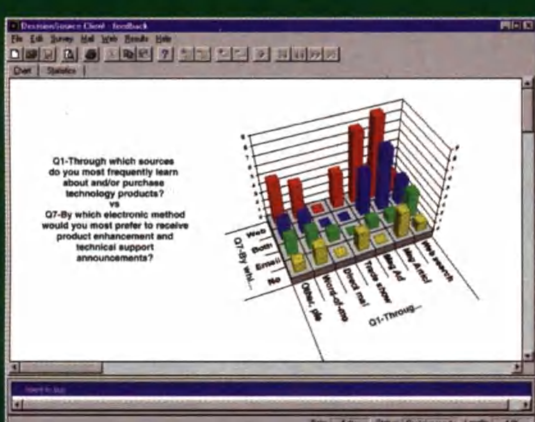

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David Ferren has joined the San Diego office of *San Diego/Las Vegas Surveys* as research director.

J.D. Power and Associates, Agoura Hills, Calif., has appointed **Frank Forkin** as a partner responsible for overseeing several key automotive customer business relationships, directing supplier services and providing proprietary and syndicated market research services.

Thomas Flynn has joined *ICR/International Communications Research*, Media, Pa., as senior vice president. In addition, **Robert Thomas** has been named vice president.

Anne Wilber has been named research manager at *BVK/McDonald*, a Milwaukee, Wis., marketing communications firm.

Frank McGinn has been named research director at *Ackerman McQueen*, an advertising agency with offices in Colorado Springs, Dallas, Oklahoma City and Tulsa. He will be based in Dallas.

Lori Laflin has joined *C.J. Olson Market Research*, Minneapolis, as director of data processing.

Laurie Reed has been promoted to associate manager, marketing research, at *Abbott Laboratories*, Diagnostics Division, Chicago.

William Ghormley has been named president of the *Marketing Science Institute*, Cambridge, Mass. He succeeds **H. Paul Root**, who becomes vice-chairman of the executive committee of the board of trustees, trustee-at-large, and senior fellow of the Institute.

Market Strategies, Inc., Southfield, Mich., has named **Kristin Lozon** research director of the Seniors Research Group, a sub-unit of the firm's Healthcare Division.

Lozon **Merrill**

Jennifer Merrill, vice president of consumer research at *ConAgra Frozen Foods* in Omaha, Neb., has been named to the advisory board of the University of Texas at Arlington's Master of Science in Marketing Research (MSMR) degree program.

Bob Holt has joined *Target Research Group*, Nanuet, N.Y., as vice president, client services. In addition, **Gayle Hazard** has been named field director and **Brian Mahon** has been promoted to vice president, project group.

MarketVision Research, Cincinnati, has announced several personnel moves. **Patricia Nudds** has been named manager, data processing; **Richard Woolf** has been named programmer in the data processing group; **James Cowan** and **Alicia Stanton** have been named senior project director in client services; and **Martin Schrager** has been named an analyst in the firm's marketing sciences group. The firm has also hired three project director trainees: **Lauren Giacobbe**, **Matthew Fitzgerald**, and **Kristina Larson**.

Francisco Salazar and **Enrique Castillo** have joined *Data & Management Counsel*, Chadds Ford, Pa., as leaders of its Hispanic market team.

Elaine Howard has been promoted to vice president at the Arlington Heights, Ill., office of *Market Facts, Inc.*

Howard **Myers**

Burke Customer Satisfaction Associates, Cincinnati, Ohio, has promoted **Tom Myers** to vice president.

The Marketing Research Association (MRA) has announced its 1998 national and chapter awards. The Distinguished Service Award, presented to **Ellen Gregory** of *NETWORK*, Covington, Ky., is given in recognition of extensive and distinguished service to both the association and the marketing research industry. Nominations are received from the entire membership. The Award of Excellence, presented to **Joyce Rachelson** of *Computers for Marketing Corporation*, New York, is given in recognition of excellence in service to the association and local chapters during the current year. Nominations are made by MRA board members only. Chapter awards were presented to the following: **Beth Wilson**, *Eagle Research*, Atlanta, Atlanta/SE Chapter; **Val Maxwell**, *National Data Research, Inc.*, Northfield, Ill., Chicago Chapter; **Luis Montenegro**, *National Opinion Research Services*, Miami, Florida Chapter; **Becky Fangman**, *Fangman Research, Inc.*, Louisville, Ky., Great Lakes Chapter; **Adam Weinstein**, *Woelfel Research, Inc.*, Vienna, Va., MidAtlantic Chapter; **Rita Langteau**, *Ross Research*, Minneapolis, Minnesota/Upper Midwest Chapter; **Jan Robson**, *Market Decision, Inc.*, South Portland, Maine, New England Chapter; **Gwen Kaplan**, *Survey Sampling, Inc.*, Fairfield, Conn., New York/NE Chapter; **Jean Douglas**, *Proview*, Burlingame, Calif., Northern California/Pacific NW Chapter; **John Bradley**, *Research, Inc.*, Plymouth Meeting, Pa., Philadelphia Chapter; **Rebecca Hanner**, *Consumer Pulse of Los Angeles*, Redondo Beach, Calif., Southern California Chapter; and **Stacy Scott**, *Dallas Focus*, Irving, Texas, Southwest Chapter.

Simeon Chow has joined the staff of New York City-based *Audits & Surveys Worldwide* as vice president/director of intellectual capital.

Charles Madden has been elected to the position of chairman of the board of the *American Marketing Association, Chicago*. He also serves as vice president for university relations for Baylor University in Waco,

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Research Industry News

ACNielsen Corp., Stamford, Conn., has acquired **The BASES Group**, including BASES Worldwide, a test marketing firm. The BASES Group will now be known as ACNielsen BASES. Jack Brown, chairman of The BASES Group, will serve as the chairman of ACNielsen BASES and will be a member of the ACNielsen Policy and Planning Committee. Headquartered in Covington, Ky., The BASES Group, is a privately-held firm with annual revenues of $65 million.

Over 700 marketing research professionals attended the **Marketing Research Association's** 40th annual conference, "The Winds of Change - Connections and Recollections," at the Chicago Downtown Marriott on June 3-5. The number of attendees was a new record for an MRA event.

SPSS Inc. has relocated its corporate headquarters to the Sears Tower at 233 S. Wacker Dr., 11th fl., Chicago, Ill., 60606-6307. Phone 312-651-3000.

A new professional association, the **Point-of-Purchase Study Group** (POP-SG) has been formed to serve as an educational information exchange among a network of researchers interested in conducting research at the point-of-purchase. The group is a coalition of academic, industrial and other researchers who maintain an active interest in, and promote some phase of, this research. The objectives are to: establish a roster of POP researchers and interested parties; develop a bibliography of published and unpublished material that has a direct bearing on the utility and limitations of POP research; disseminate literature on request to members of the study group; sponsor study and consultation sessions for the group in conjunction with other professional meetings. For more information call Janet Pizzarello at Sorensen Associates at 800-542-4321 or e-mail to janetp@sorensen-associates.com.

Connecticut in Focus, a new 4,000-square-foot focus group facility, has opened in the Hartford, Conn., suburb of Glastonbury. The facility will be headed by Mary Ann Pacocha. For more information call 860-652-0300.

InterActive Research Corporation, Atlanta, Ga., parent company of Project Research, Inc. (PRI) of Minneapolis, has acquired the assets of **Dennis And Company** of Stamford, Conn. The companies are merging operations under the name Dennis And Company Research and retaining all employees of all firms. Dennis And Company Research will be led by a management team comprised of senior staff from all firms, and will maintain full-service offices in Atlanta, Stamford and Minneapolis, as well as a client service office in Winston-Salem, N.C. Mike Straus, president of InterActive Research and headquartered in Atlanta, becomes chairman and CEO of Dennis And Company Research while Dennis P. Gehr of Dennis And Company, based in Stamford, becomes vice chairman responsible for the Stamford and Winston-Salem offices. Peter Kochenthal will continue to serve as EVP/COO of the Stamford office and Kevin Menk, formerly of the InterActive subsidiary Project Research, Inc., will become EVP/COO of the Minneapolis office. Lynn Bowden-Buzzard will continue to serve as senior vice president and general manager of the Winston-Salem client service office. Elyse Gammer of Dennis And Company, outgoing president of the MRA, assumes the role of vice president and corporate field director of Dennis And Company Research.

Schulman, Ronca & Bucuvalas, Inc., a New York research firm, has

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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.

Roxan Dinwoodie of Via Nova Consulting reports doing some qualitative research by phone. One of the qualifying questions was whether potential respondents would be willing to give "frank, thoughtful answers." One of the interviewers reported that a respondent replied to this question in all seriousness, "Who is Frank?"

Joel Lieberman of General Motors Service Parts Division reports about a focus group several years ago on automotive parts. At one point the moderator described the difference between oil filters and air filters because one of the participants in the meeting was confused. When the moderator indicated that the concept "was not rocket science," one woman stood up and indicated defiantly that, in fact, her husband was a rocket scientist.

Rich Lapin reports that his home was one of many affected by a tornado that struck Georgia in mid-April. One vendor specializing in water damage responded promptly and effectively to his needs, but after he sent in payment, the company followed up with a brief phone survey to check customer awareness on its full range of services besides water damage.

It then sent a letter which stated, in part, "...it is our goal at [company name] to make every effort to make your disaster as pleasurable as possible."

John Taylor reports using, in the late '70s, quarters as incentives in mail surveys. When a large number of quarters was needed for a survey, Taylor would arrange with his company's local New York City bank to have shiny new ones ready for pick up by a mailroom employee.

On one occasion Taylor gave the head of the mailroom an envelope with the bank's name on it containing instructions for picking up the quarters. Thinking it was a deposit, the mailroom head gave it to the newest employee, who had just started that day.

The new employee picked up $1,200 worth of quarters at the bank, and was never seen again.

Peter Thorwarth of BMA, a mystery shopping and price auditing service, relates that a few months back, a shopper from San Francisco called and apologetically said she wouldn't be able to mystery shop her assigned store after all. She then proceeded to fax BMA all 23 pages — each one blank — of her survey. Thorwarth figures that the woman felt by faxing the survey in she'd somehow formally discharged the responsibility for the assignment and had achieved "closure."

A researcher preferring anonymity tells about conducting one-on-one interviews on a new self-service kiosk product, with a prototype on display at the facility. One respondent, when asked what advertising vehicles he felt should be used to make consumers aware of the new product, paused for a moment, appeared confused, and then asked, "You mean like buses?"

Kevin Reilly of KCR/CREATIVE reports conducting a focus group with five-year-olds and explaining a five-point rating scale utilizing the familiar face of Snoopy from the "Peanuts" comic strip. On this scale, the emotive expressions on Snoopy's face ran from "elated" to "sad." In order to test kids' understanding of the rating scale, Reilly first gave them a few throw-away questions, usually extremes on the emotional spectrum. First, he asked them to, "Point to the face that tells me how much you like boiled broccoli." Understandably, the responses were mostly negative all around.

Then, to check the high end of the scale, he asked kids to, "Point to the face that tells me how you'd feel if every day were Christmas." As expected, responses were very enthusiastic — except for one boy who offered a more neutral rating. When asked why, his response was quite matter-of-fact: "It wouldn't really be a big deal to me . . . I'm Jewish."

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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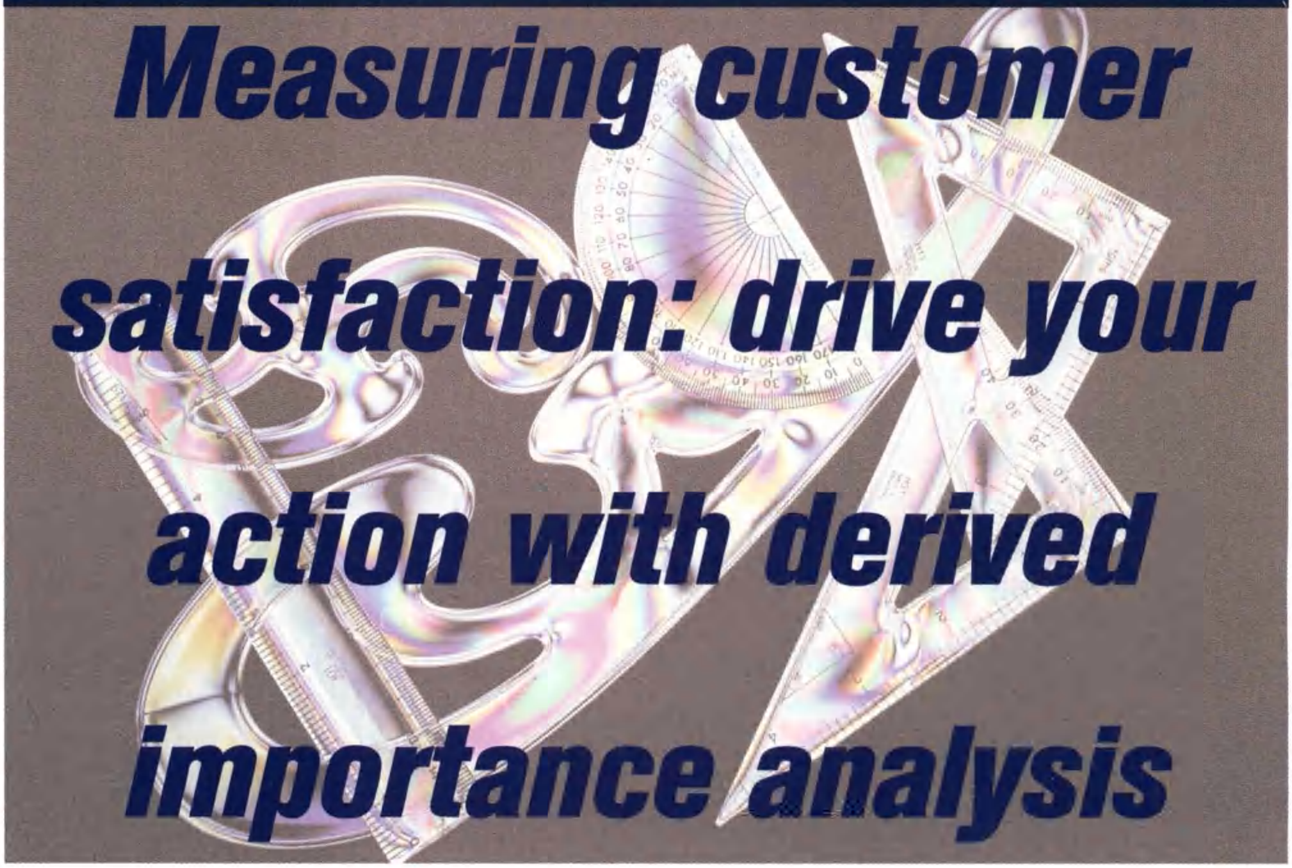

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Imagine that you've purchased a new car and a year later you receive a survey in the mail from the auto manufacturer. They want to know how satisfied you are with the car. There is a host of questions asking you to rate satisfaction with everything from the car's design features to your experience at the dealership to your maintenance visits. Because you (and several hundred others) dutifully answer each question, the auto manufacturer amasses a wealth of data. Now, their researchers can compare the relative satisfaction ratings of the various features measured. They can crosstab by demographics, psychographics, car make and model, etc. But there's one bit of critical information the individual ratings data doesn't tell them - how important the features are in influencing your overall satisfaction rating. For this, they can rely on a relatively simple yet relatively under-used analysis method: derived importance.

In today's lean and mean corporate economy, companies must allocate precious resources carefully to ensure maximum profits from their efforts. Derived importance analysis is a means of identifying the key areas on which a company must focus to ensure high satisfaction levels among customers (and high repeat or additional business). In the past, discovering that a majority of owners were less satisfied with the tail fins of a car than they were with the warranty would have sent manufacturers scurrying after development dollars for a full body redesign. What if tail fins actually are a minor annoyance, though, and the big-ticket decision influencer is the flexibility of financing options? The company has just spent millions to "fix" a minor problem while doing little to defuse a ticking time bomb for future sales.

Nuts and bolts of derived importance

Derived importance is calculated by correlating the mean satisfaction rating for each feature with an overall satisfaction rating. The calculation itself is relatively simple and can be executed in a standard spreadsheet program (e.g., Excel). The results then are graphed in a two-by-two format, which allows companies to see where they perform well and where they have problems in the eyes of customers.

Figure 1 is a sample of a two-by-two derived importance graph. The "x" axis measures the importance of product features, while the "y" axis measures how satisfied customers are with the features. The "Keep up the Good

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GTE Internetworking boosts satisfaction numbers through a customer-focused approach and an organization-wide commitment

By Robert Brass

Editor's note: Robert Brass is president and co-founder of Development II, Inc., a Woodbury, Conn., research firm. He can be reached at 203-263-0580.

George Kerns is the senior executive in charge of Network Operations at GTE Internetworking (GTEI), Cambridge, Mass. His organization is responsible for the installation, maintenance and operation of the Internet services that GTE provides for business customers. These consist primarily of three major ISP (Internet service provider) services: Internet Advantage, Site Patrol and Web Advantage. Internet Advantage provides customers with an Internet connection via a router and a dedicated line. Site Patrol is a monitored Internet security service whose function is to monitor and intercept unauthorized external access. Web Advantage is Web hosting for the provision of Web site services.

Kerns has a passion for quality. He has focused the efforts of his organization toward the continual increase in the level of quality and customer satisfaction. While many companies have an integrated process to increase the satisfaction of the customer and to improve the quality of the product or service, few have attained the level of success that has been reached by GTEI in less than two years.

The ongoing improvement is achieved through a twofold process: first, an external customer satisfaction survey and analysis technique that acts as the "meter" for the activity and, second, an internal process that uses this information in a highly disciplined way to provide transactional and systemic corrective actions.

To illustrate, we'll look at GTEI's Internet Advantage service. The coordinating department throughout the installation and operation of the Internet connection provided through Internet Advantage is called the Network Operations Center (NOC), part of Network Operations organization. Director of Customer Provisioning Steve Zajac's group is responsible for the initial installation of the service while Director of Customer Care Jim McLaughlin's group operates and maintains the network connection.

The customer satisfaction survey

While there are internal measures and standards that define operational expectations, the process is primarily driven by customer reaction. The basic source of the customer opinion is a customer satisfaction and quality survey. A customer is initially surveyed 30 days after service begins to evaluate the quality and timeliness of the installation plus the initial reaction to the service. In addition, there are several other measurements assessing the perception of customer support, the effectiveness of communications, and other key attributes that the customer deems important.

Ninety days after the installation, a second survey is conducted, focused primarily on quality and performance. From that time on, each site (installation) is surveyed once per year to assess the customer perceptions of GTEI's service, quality and support. This ongoing survey is a complete census of the customer base, not just a representative sample. The survey is conducted by telephone on a continuous and daily basis.

The scale and the measurement metric of the survey is representative of the focus upon quality. This scale is limited to four levels: totally satisfied, somewhat satisfied, somewhat dissatisfied and totally dissatisfied. Additionally, the respondent is offered the option of indicating that they have insufficient information to provide an answer. The measurement metric, against which progress is measured, is the percentage of customers who are totally satisfied. A 70 percent totally satisfied customer base is considered GTEI's minimum acceptable level.

The structure of the survey is based upon approximately 10 high-level satisfaction categories such as "professionalism of the NOC personnel," the "quality of the service," etc. If the respondent does not indicate that they are totally satisfied, there is an additional series of "drill-down" questions that seek out the specific reasons for lack of total satisfaction. This is augmented by open-ended queries to further discriminate the reasons. A unique element of this survey is that it is modified monthly depending upon the customer-identified areas currently targeted for improvement. The survey is represented to the respondent as a communication process designed to help them relate their issues and concerns directly to GTEI. It is not positioned as, nor intended to be, anonymous.

GTE Internetworking monitors its customers' Web sites from its Web Hosting Operations Center in Cambridge, Mass.

The process

The core of the program is the process that integrates the survey results and the analysis of the survey data with the operational activities of the NOC. Here is where the fundamental difference between most customer satisfaction programs and GTEI's approach becomes most apparent.

At the beginning of each month, representatives of Development II, the Woodbury, Conn., firm conducting the survey, meet with Kerns, Zajac and McLaughlin to discuss the previous month's survey results for Internet Advantage. The statistics and comments are reviewed by category, by question and by individual. Trends are assessed and causal factors discussed. The result is often a modification in the survey question set, primarily in the drill-down questions or by the

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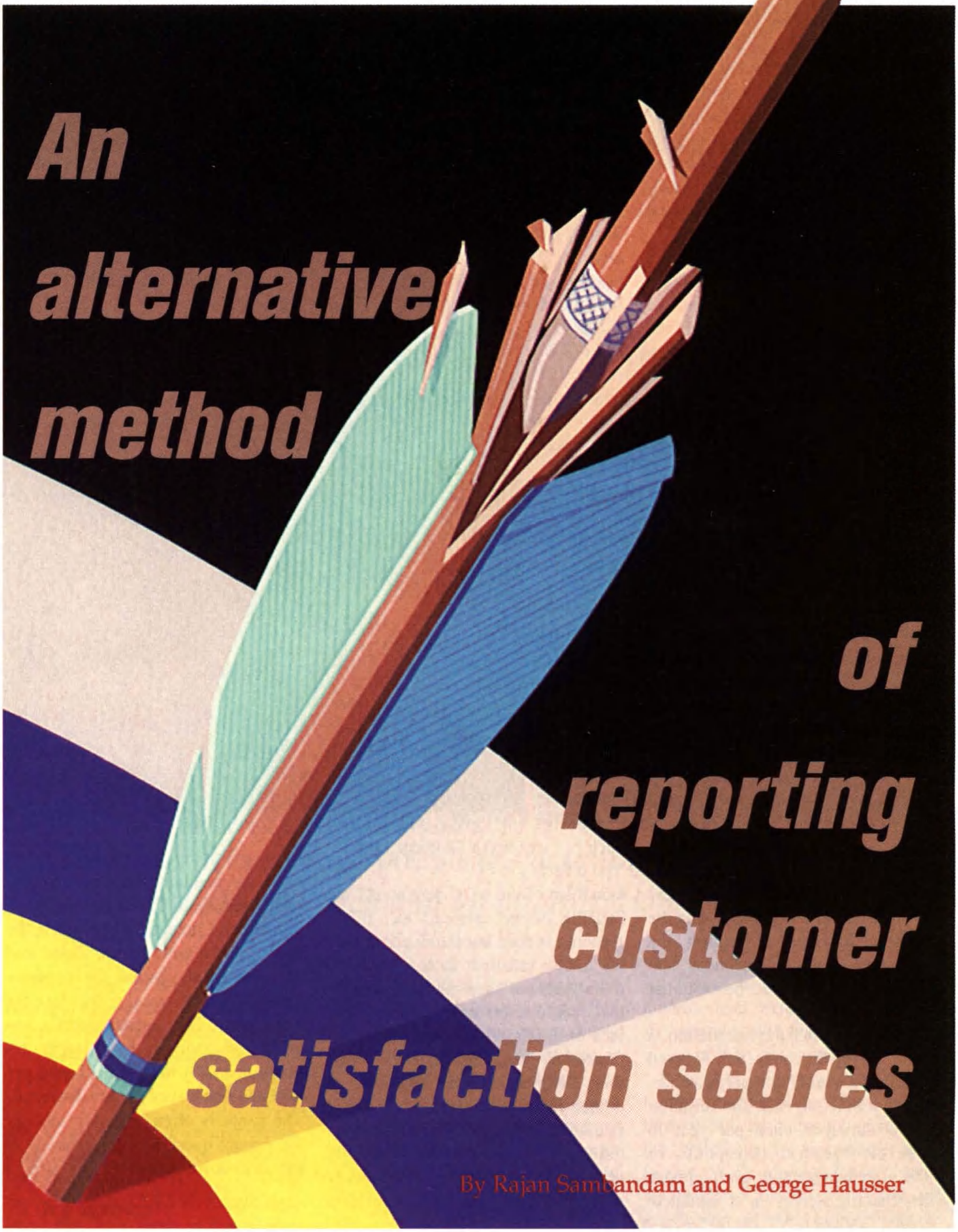
An alternative method of reporting customer satisfaction scores



By Rajan Sambandam and George Hausser

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Though customer satisfaction evaluations are widely used, reporting of these scores has varied from one study to another. This is likely the result of each method's advantages and disadvantages, as well as the personal preferences and habits of the researcher. We recently had the opportunity to report customer satisfaction scores in a unique format that assimilates the advantages of various methods and provides the manager with a clearer picture of where to take action. In this article we review various reporting methods and outline our method with an example. Further, we also discuss a type of reporting that is becoming increasingly common especially in the health care arena, i.e., the issue of comparing the performance of various facilities or centers that belong to a single network or organization. We show how our method can be applied for this purpose and why it is advantageous.

Current reporting formats

First, consider the prevailing methods for reporting attribute satisfaction scores.

- Mean scores
- Top two box scores
- Top box scores
- Top two box and bottom two box scores

(Whether it is the top two box or top three box score that is reported is irrelevant because the principle remains the same.)

The advantage of reporting the mean is that it is a summary score that takes into account the frequency of answers for each scale point. As often found in practice, the disadvantage is that the manager doesn't see much difference between the mean satisfaction scores on various attributes.

For example, on a seven-point satisfaction scale, the mean satisfaction scores on many attributes tend to be clustered in the five to six region. Thus, even though some of them may be statistically different from others, for a manager, it is not easy to understand where efforts need to be focused to improve overall satisfaction. Further, means of attributes which have bimodal distributions (high top two box and bottom two box scores) could have the same mean as those with normal distributions.

Reporting top two (or top three) box scores has the advantage of providing more variation in the data. Thus, it is easier to identify the attributes where the company is performing poorly. The disadvantage with a top two box score is that it is often quite high. This sometimes leads to complacency because its high value seems to indicate that respondents are very satisfied. However, reality could be quite different because the measure doesn't take the full distribution into account. Consequently, even though the bottom box scores may be different, two attributes with equal top two box scores could be considered to be equal.

The solution we developed for this situation was to create a single statistic which utilized both top two box and the bottom three box data from a seven-point scale.

Top box score has been suggested more recently as a better way of reporting satisfaction scores. It includes only "totally satisfied" customers and hence the lower value associated with a top box score discounts any notion of managerial complacency. However, as in the

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Customer satisfaction: fad or fundamental management practice?

By Jim Stanko

Editor's note: Jim Stanko is the customer satisfaction manager for one of Rockaway, N.J.-based Hewlett-Packard's Test and Measurement product lines. He can be reached at 973-586-5734 or at jim_stanko@hp.com.

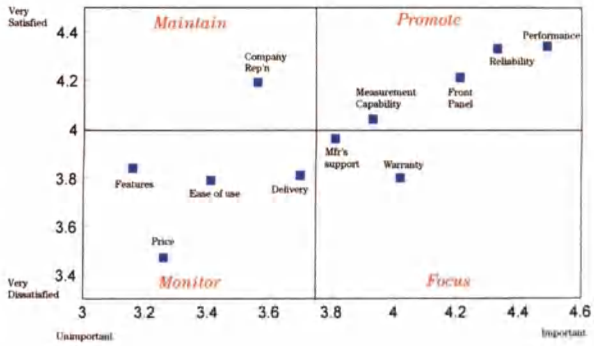
We've all seen it before: A promising initiative catches top management's interest, only to wind up on the office floor when it fails to produce quick returns. So how about this customer satisfaction thing? Is it just another passing fad, or is it a fundamentally different approach to managing a business? Can it really make a difference in the bottom line?

The hypothesis seems sound enough: If we can identify what satisfies and dissatisfies customers, we should be able to use the information to drive internal process improvements that reduce dissatisfaction, and create more loyal customers. This alone would appear to be adequate justification for supporting a customer satisfaction approach. Actually, it's just scratching the surface of what can be done with an effective program. In fact, the real power of customer satisfaction survey research lies in its application to strategic decisions. This article explores several opportunities that show why you can't afford not to have a strong customer satisfaction program in your company.

But first, the basics. The starting point for most companies is a survey of their customers, to determine what they like and dislike, and what needs to be improved. A carefully designed survey can also produce information on what factors customers consider most important, and how satisfied they are with your performance on each factor. There have been many examples of four-quadrant plots of importance versus satisfaction, such as the customer value map in Figure 1.

It should be a simple matter to identify where customers are not fully satisfied on important factors. Separation of the factors into each quadrant suggests which to act on. Customer comments about what they dislike, or would like to see improved, can help target needed process improvements or programs to address each of the key factors.

Figure 1
Customer Value Map



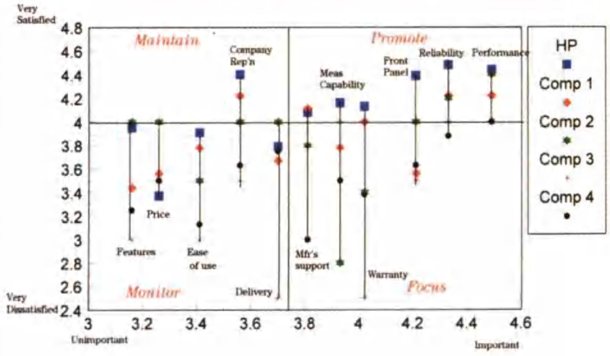
Yet some articles have already appeared questioning the effectiveness of this approach. Can we show return on investment (ROI) for these efforts? How far do we need to go in eliminating dissatisfaction? Hold these questions for a moment, and recall the time usage maxim: "It's small comfort to be more efficient at doing something that you never should have been doing in the first place!" There will always be customers who will complain about any given factor, no matter how high your performance may be, and no matter how much you have invested in improving. The key, then, is to identify the factors that give you an edge on the competition.

So clearly the first improvement needed is to survey both your own customers and your competitor's customers. This opens the door to a wealth of strategically valuable information. For a start, it shows the relative strengths and weaknesses of your company versus your competitors in each of the factors that affect the customer's choice. To get unbiased information, of course, the study should be done blind, i.e., so that the customer doesn't know who is conducting the survey.

The four-quadrant plot of data gathered in this manner is shown in Figure 2. It now highlights specific areas where the competition is vulnerable. This competitive satisfaction map can provide some good ideas for programs not just to build loyalty, but more importantly to build market share. Not only can you identify what to do to keep your customers, you can clearly see some areas where it might be possible to attract the competitor's customers.

In fact, for many markets it may not be easy to obtain market share data. Competitors may be closely held private companies, or divisions of larger companies. However, a good competitive customer satisfaction survey will gather information on what brand the customer purchased last. This data allows calcula-

Figure 2
Competitive Satisfaction Map



tion of buyer/chooser share, which can be a good surrogate for market share. True, the absolute accuracy may be lacking, and depends on having a good survey sample. But with annual customer satisfaction surveys, tracking relative share from year to year, as shown in Figure 3, is easy. This relative measure can be more useful than absolute information for determining how your brand is faring relative to competing brands, and it certainly beats having no data. Further, this can provide metrics for the programs you run; but more about this later, when we return to the issue of ROI.

New applications

The basic four-quadrant importance/satisfaction plots have been around for some time, but here are some new applications, showing how it can be used for a variety of tasks. Much has been written on the importance to a successful business of a clear and compelling value proposition. It should state the specific benefits, from the customer's perspective, that your company offers.

Figure 3
Purchase Share

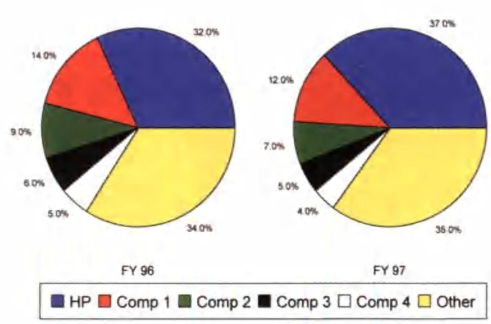
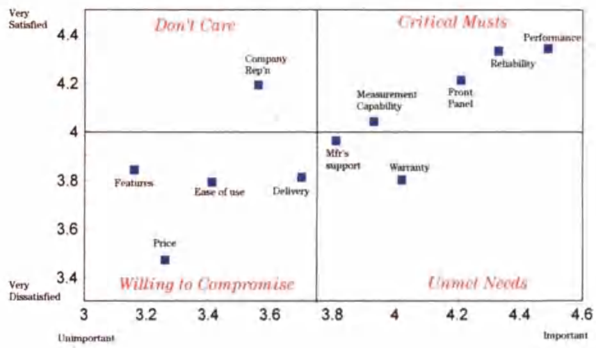


Figure 4 shows a way of relabeling quadrants of the customer value map to help with this task. The upper-right-hand quadrant indicates which values are important to the customer, and which they feel they are receiving satisfactorily. Clearly to be successful you must offer these. The lower-right-hand quadrant shows important factors which the customer is not receiving satisfactorily. This highlights the opportunity to differentiate yourself from competitors in crafting a superior value proposition. Comparing this chart with the competitive satisfaction map of Figure 2 shows not only just which factors the customer considers a benefit (importance), but, what you and your competitors are delivering (satisfaction). Of course, you can create these four-quadrant charts not only for the whole market, but for any appropriate subsegment of the data to highlight the difference in value proposition for different segments.

Add to this a study of competitors' advertising, and you can derive even more value. Taken with the analysis of their ads, the competitive satisfaction map can reveal how competitors are positioning their products and services, and how effective this is in the eyes of your (and their) customers. That could reveal some interesting insights. Why might they emphasize different factors than you would? Do their customers value different things than you are providing? Perhaps their customers represent a different segment than yours, with a different value proposition necessary to attract them. Wouldn't this knowledge be of strategic value to your business planning?

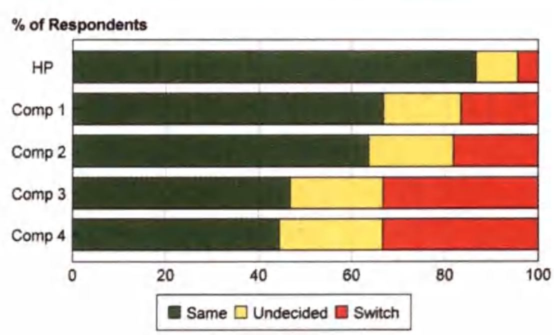
Figure 4
Customer Value Map



Competitive landscape

What about the decision to enter a new business; could anything be more strategically critical? Clearly you would like to understand the competitive landscape and what features your product needs to have to displace competitors, before entering a new market. Here's a situation where you'd like to survey the competitors' customers before you lock down the design of your new product or the appropriate business strategy.

Figure 5
Competitive Loyalty



No problem; you don't have to have customers in a market to do a customer satisfaction study of it. Furthermore, if you ask customers what brand they plan to purchase next and why, you have all the information you need to construct the customer loyalty plot shown in Figure 5. Here you can clearly see what percentage of each competitor's customers are vulnerable, i.e., planning to switch brands, or currently undecided. Compare the reason for defection, given by the customers who are vulnerable, with the satisfaction information from Figure 2. This can provide additional insights on the specific areas in which the competitor may be weak, from their customer's perspective.

But that's just for starters. The same information that we use to define the value proposition can form the basis for segmentation of the market. Remember, another way to define a segment is a group of customers that have the same value proposition. Cluster analysis can be performed on the same importance/satisfaction data which you used to develop the value proposition. With segments defined from the results, a new version of Figure 2 can be drawn showing the importance/satisfaction data just for the members of each particular segment. The critical factors which differentiate the segments will thus be clearly highlighted. Sorting the survey respondents into their respective segments allows generating crosstabs of the survey data just for the respondents in each segment. This can then be used to define many aspects of the product to meet the needs of the specific segment you decide to target.

Using customer satisfaction data for this task may seem a little surprising at first. However, a customer satisfaction study is very similar to user-needs market research. The difference is that you take a post-sale, versus a pre-sale, perspective to the questions, asking about the customer's current product. Many of the same questions can be asked, and in fact, customers may find it easier to relate to something concrete (the product they are currently using), than an abstract future product. This brings up a nagging concern. The customer satisfaction survey clearly identifies the critical satisfaction factors, whereas market research is usually concerned with identifying critical choice factors. But what is the difference between choice factors and satisfaction factors?

If you already know that the customer's choice of your product is heavily influenced by previous product usage, there may be no practical difference between choice factors and satisfaction factors. For many markets there may be little difference; this should be verified with the appropriate surveys of the target segment. But here's a quick rule of thumb: The more frequently the underlying product is purchased, the greater the likelihood that there will be strong correlation between satisfaction with the current product and choice of the subsequent product. For commodity products, satisfaction clearly wraps around to choice; experience affects purchase directly. For less frequently purchased products, like a new car or home, the basis for satisfaction today may differ substantially from the basis for choice five or more years ago.

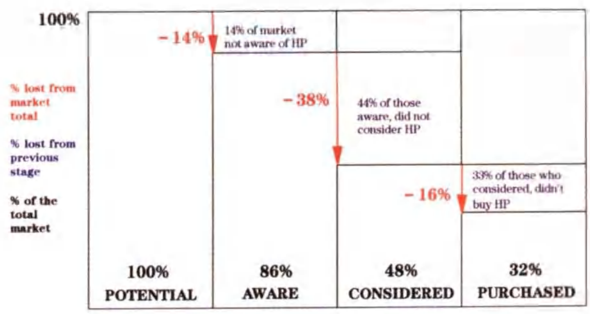
Message development

Want even more applications for this survey data? Consider using the customer satisfaction survey data to drive the message development for your advertising programs. The value proposition information is very useful to identify what customers are likely to respond to. And, of course, you have the information to know where competitors are vulnerable. . . seems like it should be relatively easy to identify appropriate advertising themes.

But before we complete this exercise, we could really use two additional pieces of information: awareness of, and preference for, a brand. This data is readily obtained from the survey. It's easy enough to ask customers what brands they are aware of. This could be either on an aided or unaided basis, depending on the medium you use for the survey, among other factors (see the sidebar for some additional thoughts on this choice).

Now for the remaining question. We have already asked the customer what

Figure 6
Market Leakage Model - FY96



Aided versus unaided awareness

There are many ways to ask respondents about their awareness of a brand. The information thus gathered can help with decisions on advertising investments and promotional programs. Two ways to measure awareness are on an aided and unaided basis.

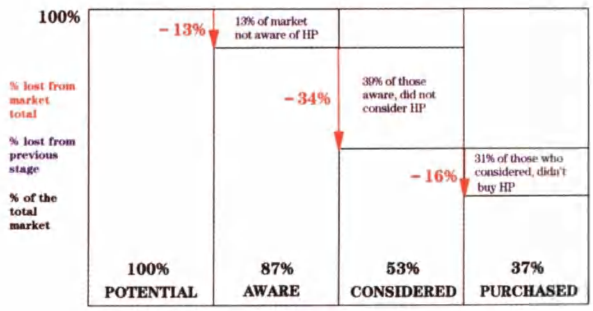
Aided awareness is measured most easily by presenting the respondent with a list of brands that are associated with the product or service being researched and asking them to indicate which ones they are aware of. This technique is most frequently associated with written or mail surveys.

Unaided awareness is gathered without the aid of a list. This approach is common with telephone or personal interview surveys. Typically the respondent is asked what brands they think of when considering the specific product or service. The respondent then answers with as many brands as they can think of. Often there may be some degree of prompting when the respondent pauses, such as: "Can you think of any other brands?" or "Are there any other brands you are aware of?"

As a general rule, aided awareness typically overstates true awareness, as respondents will sometimes associate a brand with a product if that association is plausible to them, even though the brand in question may not offer the specific product or service. On the other hand, unaided awareness may understate true awareness, because many times respondents may fail to remember a brand that they actually have seen or used.

The true level of awareness usually lies in between the values found from these different approaches. For the customer satisfaction surveys discussed in the accompanying article, measuring unaided awareness can cause some difficulties in constructing the market leakage chart. It's not impossible for respondents to mention a brand later in the survey that they had not included in the list of brands they are aware of. This type of "memory recovery" during the subsequent survey questions requires correction of the answers to previous questions to avoid inaccuracy. For this reason, it is generally preferable to use aided awareness if you plan to construct a market leakage chart from the data.

Figure 7
Market Leakage Model - FY97



brand they bought last, and what brand they plan to buy next. Suppose in between these questions we asked the customer what brand they strongly considered, at the time they bought their last brand, but didn't purchase. This tells us which brands the customer preferred enough to put on their "short list."

Consider a simple model of the stages of the buying process, which can be represented appropriately for many products, as follows:

AWARENESS ➡ PREFERENCE ➡
EVALUATION ➡ DECISION

Now we can use the data from these two additional questions to plot a market leakage chart, shown in Figure 6. This indicates where in the buying process you are losing market share. If a large loss is observed in awareness, the remedy would clearly seem to be advertising. If the largest loss occurs in the evaluation process, the Competitive Satisfaction Map, Figure 2, will reveal which factors are pivotal in the decision of the customers you are losing. Further correlation with the comments from the customers who defected at this stage can help indicate what needs to be done. But the data in Figure 6 indicates that, for this market, the largest loss is experienced in the preference stage. A different type of program may be needed to improve brand preference, based on the analysis of the underlying problem. The Market Leakage Chart can help you pinpoint where you are losing share, and how to make your business more effective.

Now, let's return to the issue raised earlier about the ROI for programs, regardless of whether they are process improvements to increase customer loyalty or more traditional promotional programs. Clearly, deployment of limited marketing funds is one of the more critical strategic decisions. If you could get a reasonable estimate of ROI for marketing programs, you could compare their effectiveness with product development programs, and decide which would grow market share more cost effectively.

Here's how. The market leakage chart shows how much share there is to be gained for different programs. If a hypothesis is formed, based on the analysis of the problem, on how much share could be gained for a given investment, an expected ROI can readily be calculated. The market leakage chart not only guides the formation of the hypothesis, it can be used to measure the results! If a survey is conducted before and after the program is implemented, the actual ROI can be calculated from the comparison of the "before" and "after" charts as shown in Figures 6 and 7.

In this case, a program designed to increase preference for this HP product line achieved five points of market share, with 80 percent of the improvement resulting from increased preference.

Hopefully, this discussion not only demonstrates some new ways to use customer satisfaction data, but also how it can contribute to successful strategic decision making. All together, it provides a compelling case for establishing, and maintaining, a robust customer satisfaction program.

Assessing the impact of study design and other factors on determinations of health plan satisfaction drivers

By David A. Langley and Lori B. Cook

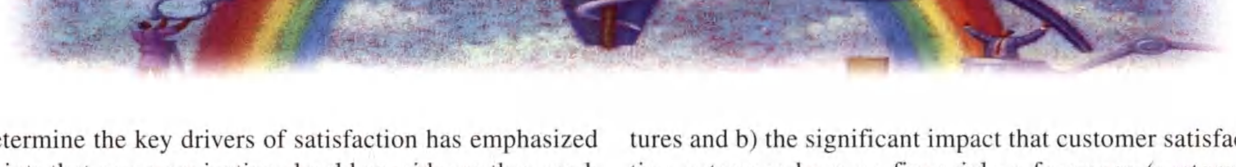
Editor's note: Dave Langley, M.A., is director of strategic research & analysis, and Lori Cook, M.A., is a senior research analyst, at Blue Cross Blue Shield of Maine, Portland.

Most organizations have long-standing experience conducting satisfaction assessment and applying it to quality improvement programs. However, recent work by one health care organization — Blue Cross Blue Shield of Maine — with statistical models to determine the key drivers of satisfaction has emphasized points that any organization should consider as they work to design a relevant and actionable customer satisfaction program:

• the ability to identify the "real" individual satisfaction drivers is dependent on the integrity of underlying study designs;

• a single-method/single-trait program design is self-limiting; robust validation and triangulation on the "real" drivers is necessary; a multi-method/multi-trait approach to identify "real" drivers should include the following components: quantitative data and models, qualitative validation, independent review and audit.

Addressing these issues is critical given a) the need to maximize the business value of survey program expenditures and b) the significant impact that customer satisfaction outcomes have on financial performance (customer acquisition & retention) and marketing performance (positioning, accreditation). Identifying the "real" drivers is a necessary component of optimizing the satisfaction



data for priority setting, policy direction, and resource allocation.

Moving to a multi-method/multi-trait approach to the identification of satisfaction drivers

Step 1: Annual Benchmark Customer Satisfaction Survey

Until recently, Blue Cross Blue Shield of Maine's (BCBSME's) approach to identifying satisfaction drivers has been dependent on a single source of quantitative data on managed care member satisfaction: BCBSME's Annual Benchmark Customer Satisfaction Survey (Benchmark Study). This study, a telephone survey of 600 managed care members (samples are stratified for program type), was developed to evaluate service quality and satisfaction, and has been administered annually since 1993.

The survey is designed to comprehensively measure health plan attributes related to plan administration, health care quality and access, service issues, plan communications, and issues related to member education and knowledge of managed care procedures. To develop a model of satisfaction drivers, point-in-time drivers analyses[1] using factor and regression techniques were conducted with the 1996 and 1997 survey data sets to identify significant predictors of member satisfaction with their health plan. Based on these analyses, the following drivers were identified:

- Plan administration (principal driver)
- Medical bills and claim payments
- Satisfaction with benefits
- Perceived ease of plan use
- Customer service
- Evaluation of the customer service representative (e.g., whether the customer service representative was courteous, knowledgeable, etc.)
- Number of times calling customer service
- Health care access
- Perceived limits in access/choice re: primary care physicians (PCPs), specialists, services and treatments

These findings were used to inform priority setting, policy direction, and resource allocation for service quality improvement. Although these findings received some validation through consumer focus groups and quality committee discussions, a robust approach was not viewed as necessary since these "drivers" appeared to align with understandings of key customer issues.

Step 2: National Standardized Health Care Survey[2]

Further drivers analysis was initiated following completion of BCBSME's administration of the HEDIS 3.0/1997 Member Satisfaction Survey, an annual mail survey of 3,720 managed care members administered via a standardized national study design. While HEDIS shares a focus with the Benchmark Study on measuring health plan attributes related to plan administration, health care access and health care quality, the underlying study design differs significantly in a number of areas. These include: method of administration (mail vs. telephone); definitions of population and sampling frame; and structure and content of individual measures (i.e., scales, item wording, and item placement).

HEDIS also differs in terms of specific content areas. For example, it includes items related to functional health status, satisfaction with health care outcomes, and plan costs that are not included in the Benchmark Study. HEDIS lacks measurement items evaluating service issues (such as evaluation of customer service contacts), plan communications, and issues related to member education and knowledge of managed care procedures that are included in the Benchmark Study.

A point-in-time drivers analysis (similar methodology to that used with the Benchmark Study) was conducted with the 1997 data. The drivers identified can be categorized as follows:

- Plan administration (principal driver)
- Services covered by the plan
- Cost
- Availability of information about plan benefits and costs
- Health care
- Quality: (e.g., thoroughness of treatments, attention given to what patients had to say, amount of time with

doctors and staff, overall quality of care and services)

- Access: (e.g., ease of choosing a personal physician, number of doctors to choose from, ease of making appointments, delays or difficulties in receiving care, difficulties getting referrals)

- Outcomes (e.g., perceptions of how much respondents was helped by the care they received)

Although this model overlaps to some extent in generally identifying health plan administrative features and access to health care as significant drivers of satisfaction, the model generated by this analysis differed significantly in the following areas:

• evaluations of health care quality and outcomes were significant predictors of satisfaction; although the Benchmark Study includes measurement items related to quality and outcomes, these items were not predictive in Benchmark Study modeling;

• the HEDIS data also identified drivers related to cost and coverage (items not included in the Benchmark Study);

• because the HEDIS instrument did not include items related to evaluation of contact with customer service representatives, this service aspect was not included in modeling outcomes.

Although the different drivers outcome is not surprising given the methodological and study design differences between the Benchmark and HEDIS studies, the new HEDIS-based findings (in terms of identifying drivers related to health care quality, outcomes, cost, and coverage) clearly have significant implications for BCBSME's priority setting, policy direction, and resource allocation. These findings also underscore the importance for organizations of recognizing that conclusions reached regarding the mix and importance of individual satisfaction drivers are dependent on underlying study designs.

Step 3: Qualitative validation

In order to further reconcile, understand and clarify issues around member satisfaction drivers identified through statistical modeling, BCBSME engaged 1) reviews of national literature on satisfaction drivers and 2) consumer focus groups.

3a. Review of national literature

BCBSME completed a comprehensive literature review of commercial and published studies regarding health care and health plan satisfaction drivers; this was particularly used to gain national and regional perspective on these local findings. These studies highlighted key points for our studies' findings and applications to quality improvement work[3]:

• not surprisingly, there is notable consistency between the perception drivers for local (Maine) consumers and those among health plan consumers in other areas of the U.S.

• among these drivers, health plan attributes (plan administration, coverage, customer service, costs) and health care attributes (perceived quality of care and outcomes, access) are both important in managing overall satisfaction rates.

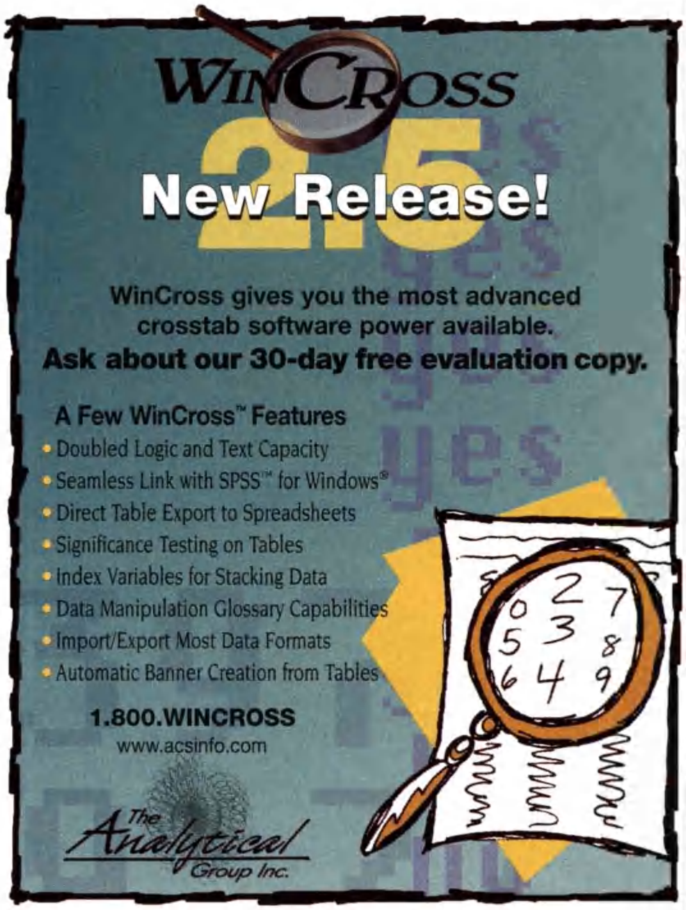
3b. Consumer focus groups

Also to develop and clarify the "real" set of satisfaction drivers, BCBSME conducted consumer focus groups to further define and understand outcomes of statistical modeling. The primary objectives of the focus group were to validate and prioritize satisfaction drivers identified in the quantitative analyses which were based on the Benchmark and HEDIS Studies. Focus group participants were given a survey instrument that included 32 items that had been identified as satisfaction drivers in the analyses, and were asked to identify and prioritize the most important items.

Participants' rankings of the most important drivers confirmed a "key drivers" set that includes the drivers identified in both studies:

- Cost/coverage
- Health care access
- Plan administration (e.g., bills, ease of use, availability of information)
- Customer services
- Health care

In addition to prioritizing this set of drivers, further discussion was completed with participants for defining specific actions that would be relevant for implementing improvements.



Step 4: Independent methodology audit

As a final step in the process of validating findings and establishing further confidence in their reliability, an independent firm was engaged to critically review analytical and validation methodologies. This engagement allowed an opportunity for a methodological critique of study designs, analytical designs, and interpretations of findings. Although this audit endorsed in-place practices and further confirmed the validity of conclusions reached regarding key drivers, it also highlighted additional methodological enhancements needed to continue to develop these understandings:

- drivers analyses should include evaluation designs which integrate health care delivery/quality issues and health plan issues into these determinations;
- further refinements can be obtained by distinguishing between sick and healthy consumers;
- implementing longitudinal modeling will identify drivers of change, rather than drivers of point-in-time differences;
- improved understanding of drivers are likely to follow from further methodological enhancements (e.g., integrating behavioral data, use of choice-based research designs).

Next steps and other considerations

BCBSME is presently implementing the following steps to optimize the business value of these analyses. These are in addition to expanding the satisfaction measurement program's ability to present a multi-method/multi-trait and self-validating approach to decision support:

- employee and management team communications are being implemented regarding key drivers of satisfaction; this is being linked to related efforts to educate employees on health care quality measurement (HEDIS), impacts on quality improvement, and role of customer satisfaction in BCBSME's business strategy;
- member-defined perceptions of health care access are being further understood and addressed;
- the integration of health plan and health care factors are being further defined and addressed;
- educational interventions are being established regarding the effects of coverage type changes for members (e.g., from fee-for-service to HMO plans) on their perceptions of the amount and quality of time given to them by their physicians;
- BCBSME is exploring ways to differentiate between the needs and perceptions of sick vs. healthy members; starting with the integration of service quality and preventive health programs through selected satisfaction-related studies (e.g., diabetics, asthmatics, heart patients);
- satisfaction-related issues among non-managed care members are being further defined and developed;
- annual satisfaction studies are being redesigned to support determinations of drivers of satisfaction change (longitudinal study designs) in lieu of or in addition to current

approaches which determine drivers of satisfaction differences (point-in-time study designs);

• HEDIS 3.0/1998 and the Benchmark Study are being used to begin the implementation of research design improvements (e.g., added analysis from administrative and external sources, technical improvements such as longitudinal modeling and use of pilots/experiments, incorporate developing industry practices).

[1]"Point-in-time drivers analyses" refers to predictive modeling applications which use a single time-point dataset (rather than, for example, longitudinal modeling to identify drivers of change between time-points). Although point-in-time analyses lack some robustness for identifying key predictors of satisfaction change, these analyses have been proven to reliably identify explanations of variance in the data.

[2]HEDIS 3.0/1997 Member Satisfaction Survey. HEDIS is a registered trademark of the National Committee for Quality Assurance (NCQA), an independent, non-profit organization that measures quality in managed care plans. The Health Plan and Employer Data Information Set (HEDIS) is a standardized set of definitions and specific methodologies that is designed to enable health plans, employers, and consumers to evaluate and trend health plan performance

[3]Selected examples of studies included in this review:

1997 Novartis Report on Member Satisfaction within Managed Care. Novartis Pharmaceuticals Corporation, East Hanover, N.J.

H.M. Allen, Jr. and W.H. Rogers, "The Consumer Health Plan Value Survey: Round Two," *Health Affairs*, July/August 1997, pp. 156-166.

The Road to Increased Market Share: Meeting Changing Consumer Expectations About Health Care. Sachs Group, Evanston, Ill.

Satisfaction research can help technology companies thrive, not just survive

By Shahron Williams van Rooij

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Many technology companies use satisfaction research to obtain feedback on customer perceptions of product and service performance. But in an industry crowded with vendors whose fortunes can move with the predictability of the weather, the ability to develop a repeatable process that will yield actionable results often suffers under the constraints of time and limited resources.

To keep ahead of the competition requires a commitment to anticipate customer needs, not just respond to problems. The customer satisfaction research process offers an excellent opportunity to demonstrate that commitment.

How can technology vendors develop a more proactive research process and still remain within the boundaries of their financial and human resources? There is no substitute for solid research designed in partnership with a market research company and with internal and external constituents. In achieving this, however, here are some specific opportunities to consider:

• Electronic "pre-search" — Technology vendors often use electronic message centers, called "list servs," to provide customers with timely product updates and instructions. Run on secure networks with password protection and accessible to customers only, these list servs are also used by the customers themselves to explore how fellow users address a particular problem or

deploy a specific product function.

The vendor can also float questions on the list serv in order to "pre-search" the mindset of the customer and obtain guidance for developing the satisfaction survey questionnaire. By using a mechanism that is already in place and which customers use on a regular basis, the vendor can assist the market research company in fleshing out the specific aspects of product and service that customers really care about. Measuring key performance indicators as defined by the customer allows the vendor to target resources to specific needs.

• Satisfaction stewards — Responsibility for resolving problems usually rests with the department or division in which the problem arises. But managers should be an integral part of the research process, not just the recipients of the research report. By making managers stewards of those sections of the satisfaction survey dealing with the performance of their own departments, managers become stakeholders in the satisfaction research process and have ownership of the results. Management can then use survey findings to come up with creative solutions that go beyond resolving a specific problem, and enhance overall customer service.

• Key driver analysis — Even vendors with the deepest pockets must make choices. By asking customers which of the key performance indicators measured in the survey relates most to their perceptions of the vendor overall, the vendor can prioritize responses and areas of improvement.

• Communication of results — Sharing is caring. When vendors acknowledge customer feedback, they are clearly demonstrating commitment to anticipating the needs of their customers. The feedback should include a thank-you for what the customers say the vendor has done well, and an acknowledgment of those areas that customers say need improvement, along with what steps the vendor plans to take to make those improvements.

This communication chain also extends to the vendor's internal constituents who, in turn, should share the information with their staff.

• Quality process improvement — Customer satisfaction surveys are not just research, but an integral part of a total quality program. By incorporating the satisfaction research process into the total quality program, the vendor demonstrates a strong commitment to continuous partnership with customers in pursuing improvements in business practices and in delivering products and services.

Strengthen retention

Most companies seek to get the most from their customer satisfaction research and strengthen customer retention. For technology companies, the ability to think out of the box can spell the difference between thriving and just surviving.

Improving customer loyalty through a strategic value-focused approach

By Christopher Ratcliff and Elizabeth Horn

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All customers are not created equal. If customer satisfaction and loyalty measurement programs are based on the "average" customer, one cannot expect to achieve anything more than average results. So in this age of celebrating diversity, why do most programs insist on treating all customers the same?

Customers are asked to rate various attributes, and then the data is evaluated on limited demographic information. When considering more sophisticated methodologies and analyses, many argue that it is too expensive. While everyone knows that satisfaction and loyalty measurement programs are important for a progressive corporation, costs must be kept to a minimum. Financial constraints, however, do not have to restrict the ability to achieve truly outstanding results.

Instead of measuring performance among all customer constituencies, the focus should be on customers

Figure 1	Group 1 Action/Adventure	Group 2 Romantic/Drama	Group 3 Variety
Heavy User	Y Big Screen Good Sound Stadium Seating 20+ Screen Theater Selection at Snack Bar	X Ratings Weekday Close to Home Comfortable Chairs Professional/Courteous Employees	Y Big Screen Good Sound Stadium Seating 20+ Screen Theater Selection at Snack Bar
Moderate User	Z Night Weekend Cleanliness Non-Crowded Theater Discount Passes	W Matinees Ratings Close to Home Heavy Security Well-Lit Parking	X Ratings Weekday Close to Home Comfortable Chairs Professional/Courteous Employees
Light User	X Ratings Weekday Close to Home Comfortable Chairs Professional/Courteous Employees	Z Night Weekend Cleanliness Non-Crowded Theater Discount Passes	W Matinees Ratings Close to Home Heavy Security Well-Lit Parking

who maximize the company's financial return. Customer attitudes and values must also be included in satisfaction research — especially in this era of growing diversity.

Marketing and research efforts that focus solely on changing customer behavior miss the mark. Behavior is the direct result of values/beliefs and attitudes. To truly understand why customers are purchasing the products (their behavior), a close examination of who they are (their attitudes and values) becomes necessary. (See graphic.) When attitude, value, and behavior segments are

Values/Beliefs → **Attitudes** → **Behavior**

identified, satisfaction and loyalty programs can be optimized. This will ensure that customers' basic needs and wants are met — in a way that is individualized to each of the identified segments.

Figure 1 illustrates the results of an attitudinal, value, and behavioral segmentation. In this example, different types of heavy users of a theater chain have been categorized as having attitudes and values falling into three distinct segments. The heavy users are vastly different from each other, even though they all have one behavior in common — frequently going to the movies. If satisfaction strategies are based on meeting the needs and wants of only one type of customer, satisfaction among the other segments cannot be assured.

Different heavy users have varying attitudes and values that drive them to purchase a particular product or service. For example, action/adventure movie-goers (Group 1) tend to be single males between 14 and 35 years old who can be classified as adventure-seeking, high-tech and computer literate. The variety segment (Group 3) includes both male and female, non-age-specific individuals who tend to be college educated or above, and are open to new ideas. Even though the demographics of the heavy users in both of these groups differ greatly, they have similar expectations when they choose a theater to attend. However, their expectations are not the same as those of the predominately female, idealistic romantic/drama movie patrons in Group 2. Likewise, it is unrealistic to expect that all heavy users of any company or product would be looking for the same features and/or services to increase their satisfaction.

Analyzing satisfaction via a value segmentation approach allows strategic allocation of resources, and increases operational efficiencies. This segmentation approach leads to a satisfaction system that addresses the unique needs and wants of different types of customers.

This type of examination will allow the development of an optimal satisfaction program that will not only retain customers, but can also increase the products and/or services that they purchase. In addition, it provides the company with a focal point from which to increase the revenue potential from different types of customers.

In the past, customer satisfaction programs have been a cost of doing business. Because a successful satisfaction program can now be a contributor to corporate revenue, cost issues that once confined programs to a limited view of "average" customers are no longer necessary. Ultimately, value segmentation provides a more complete picture of the customer, thus allowing companies to form lasting and profitable relationships.

If satisfaction strategies are based on meeting the needs and wants of only one type of customer, satisfaction among the other segments cannot be assured.

Powering your way to reduced customer churn and increased customer loyalty

By R. Eric Reidenbach and Gordon McClung

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Albert Einstein once cautioned, "You can't solve current problems with current thinking. Current problems are the result of current thinking." And, while we are reasonably sure that the "current problems" or "current thinking" Einstein was mentioning had nothing to do with electricity, we do believe that his advice is extremely relevant for the utility industry.

As the industry moves from a regulated environment to one directed by market forces, a new type of thinking must emerge. It is a type of thinking that is directed by and responsive to market dynamics. The critical dynamic that will direct behaviors is value-customer value.

If the industry follows patterns of the financial services, health care, telecommunications, retail and other industries, we will see an increased emphasis on price.

Some will believe that price is the only way to compete. But if we have learned anything from those who have unshackled themselves from the "current thinking," it is simply this: "There need be no such thing as a commodity!" Successful competitors in these deregulated industries have learned that the key to the kind of performance that identifies them as industry leaders is based on the creation and delivery of outstanding customer value. Non-current thinking is the kind of thinking that divorces itself from simplistic notions of customer satisfaction and customer service. Non-current thinking drives critical questions concerning value, loyalty, retention, and how these factors lead to operational and strategic excellence.

Understanding the concept of value

The concept of value is not new. However, what is new is the ability to measure customer value. And with that measurement capability comes a better understanding of how to manage customer value. Value is a powerful buying dynamic influencing all types of customers and all types of buying situations. Value is the interaction between the benefits that a customer wants in a transaction or relationship and the price that the customer is willing to pay to obtain those benefits. In its functional form it is represented as:

Value = Benefits sought :: Price to acquire the benefits

There are several critically important propositions regarding value. First, value is relative. It is relative to the value offered by competition. Your value proposition has meaning only when it is compared to the value proposition of your competition. The key question from both a customer acquisition and, ultimately, a customer retention, standpoint is "Who is offering the best value?" This relativity issue is a major weakness with regard to many CSM approaches. Companies that do not get competitive readings are operating in a vacuum and are seeing only part of the picture, a dangerously one-sided picture with consequences for misleading and misdirecting initiatives.

Second, value is market segment-specific. Your commercial customers will more than likely define value differently than your residential customers do. Moreover, large commercial customers will probably define value differently than smaller commercial customers. The key to creating loyalty among the different market segments is to fine-tune implementation and customer delivery processes to market segment specific definitions of value.

Third, value, as a strategic and operational approach to the market, becomes so much more potent when it is linked to other information platforms within the organization. This is particularly true when the customer value information system (CVIS) is linked to revenue and cost information. How much is a given customer worth? What are the consequences of poor value delivery? What is the annuity associated with a loyal customer who is receiving outstanding value from you? These are critical questions, the answers to which will make managing the customer base and reducing the inevitable churn more effective.

Many organizations are currently measuring satisfaction and use this metric to shape strategic and operational decisions. Satisfaction ignores several realities of the buying decision and provides only a partial understanding of how evaluative decisions are made.

For example, most customer satisfaction systems look at each attribute or dimension individually. Included in this analysis, if measured at all, is the price attribute. Price is treated as simply another product attribute. This is too simplistic an approach. Customers evaluate attribute performance in terms of the price that they pay for those attributes.

Second, many CSM systems do not take into account competitor performance. It may be pleasing to note that 69 percent of your customers are either satisfied or extremely satisfied, but — and it is a big but — are your competitors' customers getting greater satisfaction? Failure to monitor competitive actions can be dangerous.

Third, satisfaction begs the issue of "What is the customer satisfied with?" Is it the attributes, price, or what? Our research indicates that there is a direct link between customer value and profitability. It is shown in what we call the Value Performance Chain®.

The Value Performance Chain®

Customer Value
→Customer Satisfaction
→Customer Retention
→Profitability

The Value Performance Chain clearly points out the connections among customer value, satisfaction, loyalty and profitability. Customers are, in the long run, satisfied not with individual attribute performance, but with the value relationship they establish with a supplier. This satisfaction with the supplier's competitive value proposition creates a loyal customer. Moreover, we know from experience that the costs of customer acquisition can run as high as 10 times the cost of customer retention, making the linkage between loyalty and profitability extremely cogent and strong. Focusing on satisfaction is misdirected because it ignores the cause of satisfaction: value. Customer value becomes a critical driver of retention and profitability. This is the new type of thinking that will guide the successful electric supplier of the future.

Putting value to work

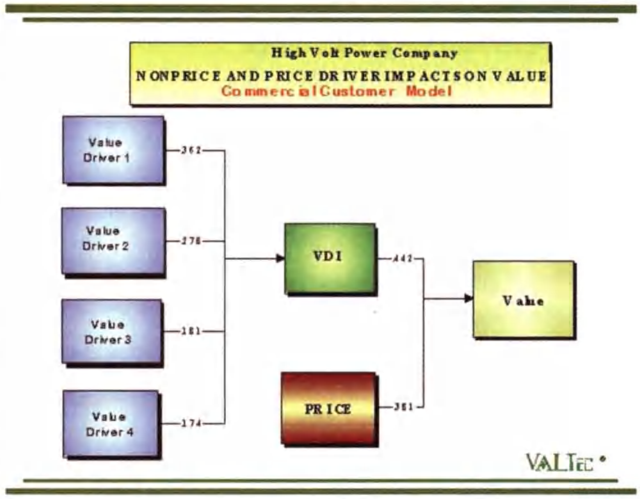
What are the strategic and operational implications of customer value in the electric utility industry? Here's an example of how value can help you both from a customer acquisition standpoint and a customer retention perspective.

The first step is to develop a valid model of value for each segment. This involves identifying the key value drivers. For example, a model of value developed for commercial customers revealed that there were four non-price value drivers. These value drivers vary from segment to segment and are comprised of individual attributes concerning such factors as service delivery, customer relations, billing, repair, ability to solve customer problems, the providing of useful information, etc.

In addition, there is a price driver that measures customer perceptions of fairness, competitiveness, etc. These are then used to model value. Each driver varies in its relative importance in explaining how customers within a segment define value. For example, in the model shown in the graphic at right, which shows the value drivers for customers of High Volt Power Company, Value Driver 1 is the most important (.362), followed by Value Driver 2 (.278), Value Driver 3 (.181), and Value Driver 4 (.174). Taken together, these drivers become the benefits that the customers in this segment consider the most important in a relationship with their electric supplier. The specific number of value drivers as well as the individual weights of the drivers will vary from segment to segment.

These individual value drivers are combined into a value driver index (VDI). This is weighted in terms of their relative importance. This VDI, in conjunction with the price driver, is used to model customer value. The model shows the relative impact of both the VDI (.442) and Price (.381) in the customer's definition of value. In this case, the VDI (non-price drivers) are somewhat more important than price in determining value.

This hypothetical model of commercial customers indicates that non-price factors and price are not equal contributors to commercial customers' definitions of value. The relative contribution of non-price and price drivers will vary from market segment to market segment.

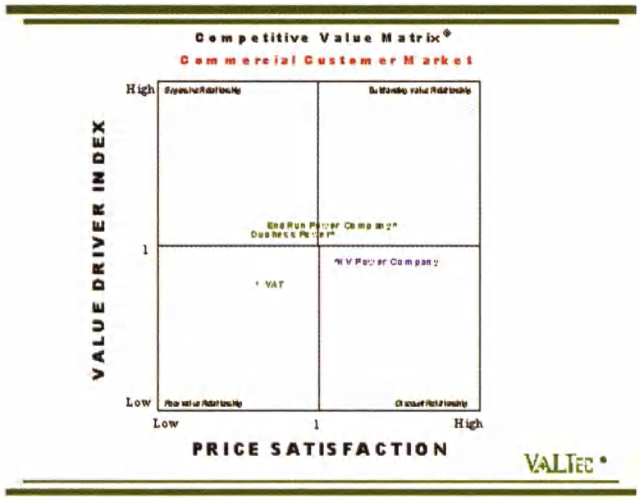


Identifying your competitive value proposition

Your competitive value proposition can be examined through the use of our Competitive Value Matrix®, which uses the definition of value (VDI and price) generated from the market segment (commercial customers) to map competitors into one of four quadrants describing the kind of relationship they perceive that the utility offers existing and potential customers:

- Outstanding value relationship. Customers locate competitors in this quadrant based on above average segment performance on both the VDI (benefits) and price satisfaction. Outstanding value relationships result from high benefit performance interacting with high price satisfaction. In the example shown on page 50, two competitors occupy the outstanding value relationship quadrant: End Run Power Company and Duchess Power. These companies are in the best position to leverage their differential value advantage into superior performance. This is the only true value position. All others are inferior in terms of the capacity to sustain high performance.

• Poor value relationship. Customers placing competitors within this quadrant do so based upon below market average performance on the VDI (benefits) and price satisfaction. Poor value results from poor benefit delivery interacting with a high price (low price satisfaction). Customers placed VAT within this quadrant.



• Discount relationship. Competitors located within this quadrant are perceived as providing poor benefit delivery (low VDI scores) but above average scores on price satisfaction. Customers are saying that while the service delivery is not good, we are not paying too high a price for it. Customers within the commercial customer segment locate High Volt Power Company here.

• Expensive relationship. This describes the utility that is providing above average performance on benefits but at a high price. In other words, the service delivery is good but customers believe the price is too high. In the current example, no competitor is located within this quadrant.

The distance between End Run Power Company and High Volt Power Company is the differential value advantage End Run holds over High Volt. Our experience clearly supports that a differential value advantage can readily be translated into:

• relationships that are based on less price sensitivity;

• greater customer willingness to recommend the utility to others;

• higher overall customer satisfaction with their electric supplier;

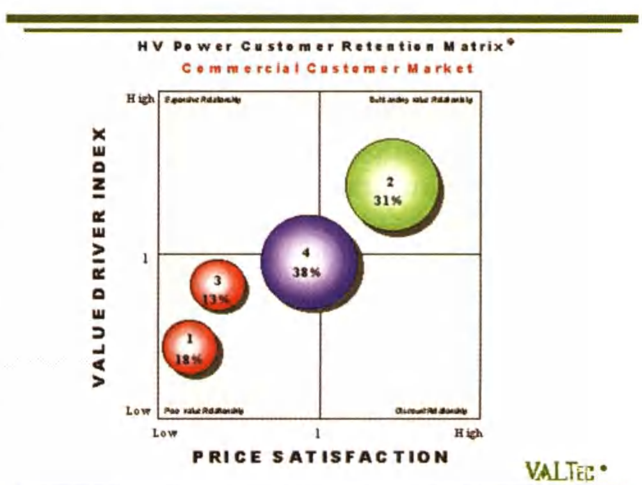
• higher evaluations of service delivery;

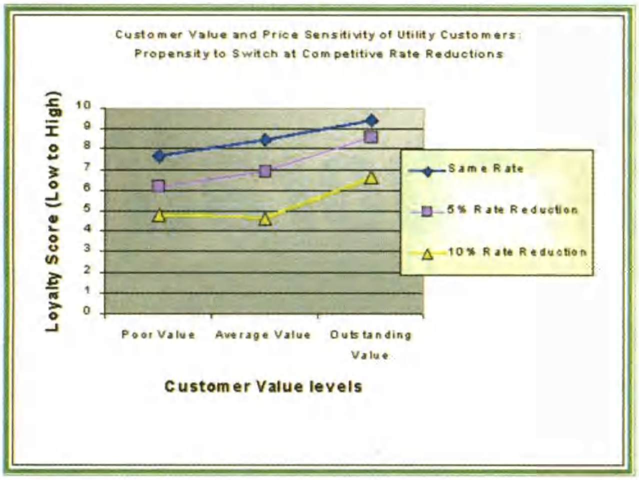
• greater loyalty and less willingness to switch;

• higher market share;

• greater profitability.

The task facing High Volt Power Company is to improve its competitive value proposition. A blueprint for this is readily available from a disaggregation of the various value drivers and using this information as input into its continuous improvement process. Customers indicate satisfaction with the pricing policy. Improvement on the key value drivers, beginning with the most important one, Value Driver 1, will allow High Volt Power to move from its current position within the discount value relationship quadrant to the outstanding value relationship quadrant.





The Customer Retention Matrix®

Using the same matrix, customers of High Volt Power can be examined based on their perceptions of the value provided by High Volt Power.

Examination of the Customer Retention Matrix reveals two key pieces of information: 1) which customers are vulnerable and 2) how many of them are susceptible to better competitive value propositions. In other words, which of your customers are at-risk to competitive acquisition efforts? For example, in the case of High Volt Power, 31 percent of its customers describe their relationship with High Volt Power as one of outstanding value. About 48 percent of its customers would describe their relationship as average value. Finally, 31 percent of High Volt Power customers would characterize their relationship as one of poor value. Customers located within the poor value quadrant are likely defectors. The probability of their defection is significantly higher than their outstanding value counterparts. In this case, about 31 percent of High Volt Power's commercial customers are at risk.

The average value customers are the next least loyal. The 38 percent of High Volt Power's customer base that describe their relationship as one of average value are also an at risk group.

The most loyal are the customers that are located within the outstanding value quadrant.

As evidence of the effect of value on loyalty consider the above graph. On the vertical axis is a 10-point loyalty scale ranging from low (0) to high loyalty (10). The horizontal axis shows three value groups, poor value group one, average value group four, and the outstanding value group two. These are the same High Volt Power value groups shown earlier. How price sensitive are the different customers in the three different value groups? What is the likelihood that customers will switch to an alternative supplier at the same rate, at a rate reduction of 5 percent or a rate reduction of 10 percent? Clearly, a distinct pattern emerges. Those customers in the outstanding value group enjoy significantly and substantially higher loyalty scores than do their counterparts in either the average value group or the poor value group. Customers enjoying an outstanding value relationship with their electricity supplier are more loyal and less price sensitive. How do you reduce churn and enhance loyalty? Become a deliverer of outstanding customer value!

Act now

As deregulation hits the utility industry, many organizations will try to identify a strategy that will increase the probability of their survival and growth. Becoming a value-driven organization means an increased probability of both survival and growth. It is the major weapon against reducing churn. And the time to begin the value journey is now.

During years of operating as regulated monopolies, utilities have been teaching their customers about the kind of value they will receive in a deregulated competitive environment. Many customers, like many of High Volt Power's, have not appreciated these lessons. We have learned from recently regulated industries these are lessons that are not easily and readily un-learned. It is relatively simple to teach customers that they cannot get good value from you. It is much more difficult and resource-consuming to re-teach them. To wait until competitive pressures are swirling around you is too late. If you are not actively managing your own competitive value proposition, ask yourself who is. The answer: your competition. If you're not willing to trust something as important as the management of your value proposition to your competitors, now is the time to take control. Now is the time to unshackle yourself from the "current thinking" that has produced "current problems."

Create a collaborative service culture in your call center

By Robert Heckman and Audrey Guskey

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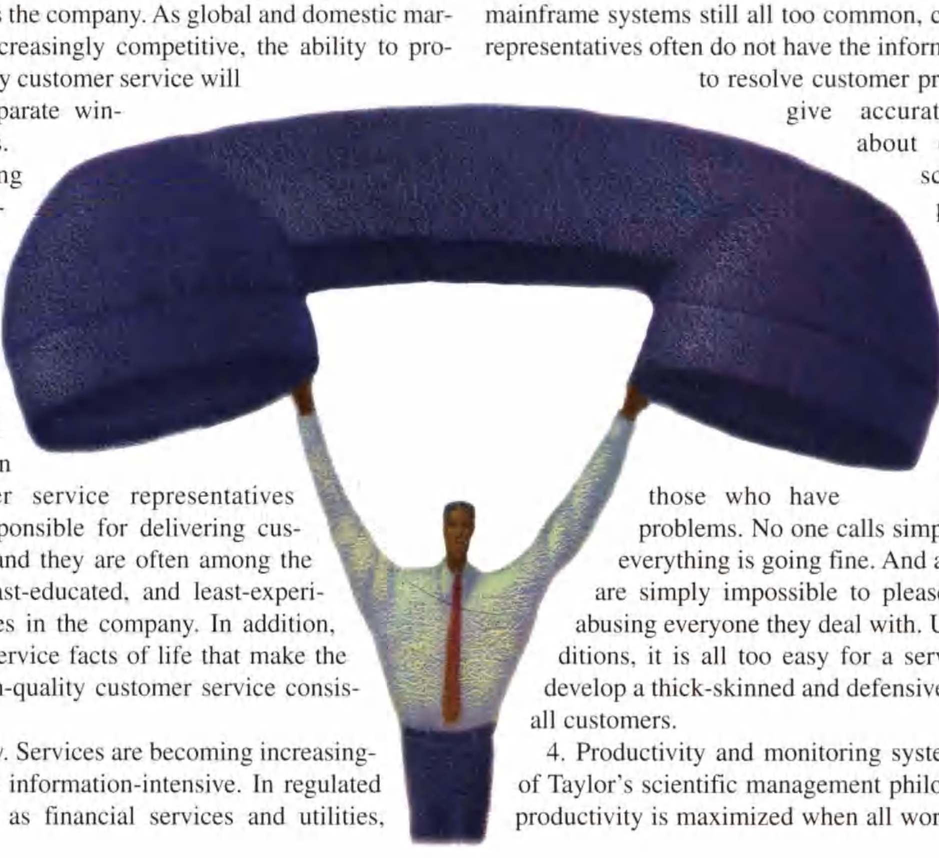
Is a telephone call center your company's "front door?" In many businesses, the call center not only represents the company, it is the company. As global and domestic markets become increasingly competitive, the ability to provide high-quality customer service will increasingly separate winners from losers.



But delivering consistent, high-quality customer service presents a real challenge for most companies. In a typical service organization many customer service representatives (CSRs) are responsible for delivering customer service, and they are often among the lowest-paid, least-educated, and least-experienced employees in the company. In addition, there are four service facts of life that make the delivery of high-quality customer service consistently difficult:

1. Complexity. Services are becoming increasingly complex and information-intensive. In regulated industries such as financial services and utilities, governmental bureaucracies are constantly changing the rules. In the airline industry, sophisticated yield management programs adjust prices in real time, making it difficult for service representatives to understand, much less explain to customers, the company's current offering.

2. Inadequate information systems. While increasingly powerful and sophisticated information systems let companies continuously tinker with and adjust their offering, these same information systems often don't provide sufficient information to service representatives. With legacy mainframe systems still all too common, customer service representatives often do not have the information they need to resolve customer problems, or even give accurate information about current prices, schedules, and policies.

3. Problems, problems, problems. In most service delivery operations, the only people who call are those who have problems. No one calls simply to report that everything is going fine. And a few bad apples are simply impossible to please, insulting and abusing everyone they deal with. Under these conditions, it is all too easy for a service provider to develop a thick-skinned and defensive posture toward all customers.

4. Productivity and monitoring systems. The legacy of Taylor's scientific management philosophy (i.e., that productivity is maximized when all workers conform to

a detailed, standardized work process) is often seen in the control systems applied to customer service operations. Productivity systems combined with random monitoring leads many CSRs to develop whatever strategies they think are necessary to "make their numbers." A "make-the-numbers" culture can create a strong barrier to the delivery of quality customer service. In our research with a call center for one large utility company, CSRs consistently said that the quantitative targets inhibited their ability to deliver quality service.

These four facts of life exist to a greater or lesser degree in every customer service operation. Despite these barriers, however, you as a leader can help your CSRs deliver a consistently high level of customer service quality. Our research and experience lead us to believe that the answer lies in the creation of a collaborative service culture within your company.

What is a collaborative service culture?

A collaborative service culture is an environment in which both service providers and customers are predisposed to help each other by cooperating and working together to reach a mutual objective. The result is total customer satisfaction, CSR job satisfaction, and committed customer loyalty. Our approach to creating high-quality customer service rests on two important assumptions: 1) all service is collaboration, and 2) the most important collaboration is discretionary.

• All service is collaboration. Services are delivered predominantly through service encounters, and in a service encounter the service itself is jointly created through an interaction between the service provider and the customer. The provider and the customer collaborate to create the service. The effectiveness with which they do this determines the level of quality attributed to the service. Thus, effective collaboration is at the heart of quality service delivery.

• The most important collaboration is discretionary. While service collaboration can to some degree be mandated and scripted, it is ultimately within each individual CSR's power to decide the extent to which he or she will cooperate. Leadership and management theorists since Chester Barnard (1938) have described the limits of formal authority in getting employees to contribute their best efforts. All high performance organizations have in common this ability to elicit discretionary contributions from their members – to create a culture where going above and beyond the call of duty is the norm.

Thus the fundamental challenge facing managers responsible for creating high-quality customer service operations is how to elicit this discretionary collaborative behavior from each customer service representative. If a manager cannot mandate or proceduralize the discretionary component of collaboration, what tools can be used to create a culture in which discretionary collaboration is an integral part of the underlying norms of the organization?

Creating a collaborative service culture

Five years of research have convinced us that there are three essential leadership actions necessary to create a collaborative service culture: 1) diagnose the current service culture, 2) create management commitment, and 3) give CSRs collaboration tools.

1. Diagnose the current service culture. Before beginning any organizational change program, a leader is wise to commission a thorough diagnosis of the current culture. Because no two organizations are alike, no two efforts to transform a service culture will be exactly similar. How can the current service culture be diagnosed? Information is needed from four crucial sources: customers, CSRs, managers, and organizational systems. The seeds of collaboration are sown when customers, managers, and CSRs are involved in the earliest stages of the transformation process, and resistance to change will be reduced

A variety of qualitative and quantitative research techniques can and should be used. Often an organization has in place a rich set of tools for measuring customer satisfaction. These existing tools can be a very useful part of the diagnosis process. Survey instruments can be used to learn more specific information about the state of collaboration in a culture, and these instruments can be targeted at both employees and customers. More in-depth, qualitative research will allow employees and customers to talk openly and freely, revealing underlying dimensions that survey instruments cannot uncover. Finally, organizational incentive and compensation plans, control systems, monitoring systems, and information systems are all artifacts which can reveal significant information about the state of a company's culture.

2. Create management commitment. No effort to create a collaborative service culture can possibly succeed if both senior management and first-line supervisors are not committed to it. There are two major steps that must be taken if a cultural transformation is to succeed. First, the management team must understand the basic principles of discretionary collaboration. If the management team is not thoroughly familiar with these principles, they will simply apply techniques in a cookbook fashion. Second, in addition to understanding the principles of discretionary collaboration, managers must firmly believe that it is in their own best interest to implement such a program. If they receive mixed signals from executive management, from the compensation plan, from the allocation of resources in the budgeting process, it is unlikely that a program to create a collaborative service culture can succeed. Creating the right conditions in the management team is probably the most difficult step in creating a collaborative service culture.

3. Give CSRs collaboration tools. Only when the existing culture has been thoroughly diagnosed and the management team has formally committed to the creation of a collaborative service culture can the arming of the frontline service personnel begin. Service representatives must first learn the causes of satisfaction and dissatisfaction with service encounters. More important, they must learn what the causes of discretionary collaboration are, because the fundamental goal of creating a collaborative service culture is to ask customers for their help. This paradox is at the heart of the collaborative method. Service representatives must learn that the four magic words are not "Can I help you?" (although that is an essential question). But more important is the question "Will you help me?" Creating the conditions in which the customer wants to help the provider will create the collaborative service culture in which the customer is most likely to be satisfied. In a collaborative service culture, both customer and provider have the feeling and the mission of working together and helping one another to create a positive outcome for both.

The tools that CSRs need to create this climate are derived from the research on discretionary collaboration that we have been conducting for the past five years. CSRs can learn how to:

• ask for the customer's help;

• better understand the customer's situation;

• communicate their situation to the customers;

• capitalize on existing relational bonds and build new ones;

• instantly understand the kind of customer they were dealing with and tailor their strategy toward that customer accordingly.

These tools can be taught to CSRs in several days in a workshop complete with plenty of opportunities for practice and role-play. However, more important than workshop training is the reinforcement and practice that must be provided when the CSRs get back to the job. Collaborative service culture training must be "just in time." If it is not immediately followed by a period of intense practical application on the job, the benefits of the training will be lost.

Not easy

As is the case with any organizational transformation, creating a new culture is not easy. The collaborative service culture described here may be fairly close to the existing culture for some organizations and very far away from the current culture of others. How far will determine the difficulty of the journey. However difficult, this journey will provide any organization with great rewards. A collaborative service culture will result in higher levels of customer satisfaction, greater customer loyalty, improved customer retention, fewer errors, and ultimately in lower operating costs for the customer service function.

Assessing customer requirements: the Kano method

By Vince Farace and Mike Swenson

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"It's not good enough to go to your customer after you have sold them the product and ask them how satisfied they were. What you need to do is go to your customers before you develop the product or service and find out what is important to them." — Arnold Weimerskirch, vice president for corporate quality, Honeywell, in a Minnesota Quality Award interview, *Twin Cities Business Monthly*, November 1997.

As this comment illustrates, satisfying customers begins the moment an organization decides to market a product, a service, or a product and service bundle. This article describes a measurement process for assessing – and predicting – customer reactions to the features included in the product/service bundle.

Efforts to improve customer satisfaction often lead companies to the conclusion that products or services need to be redesigned, because no lesser action truly satisfies. Further, companies are motivated to introduce new products and services by changes in available technology, by competitor initiatives, and by the classic business desire to reap the profits of an effective differentiation strategy.

In many companies, the drive to create new product/service bundles arises entirely from within the organization, based on deep and heartfelt convictions about what is "right" for the customer. But the investment for a new product/service bundle can be staggeringly high – concept development in the millions, with manufacturing, advertising and distribution costs that are orders of magnitude higher. Further, there is a significant opportunity cost – the dollar and human costs at stake if a product fails in the marketplace.

Those companies with a genuine customer orientation change the product development equation – they supplement and guide internal development efforts with a more thorough understanding of customer requirements. In that way, they go into product development opportunities with the belief that they will be more successful in the market if they design-in customer requirements up front. They recognize that this makes the ultimate goal of customer satisfaction that much easier to achieve.

Product feature generation

Once the broad decision is made to develop a new product, there are many ways that the initial list of potential features is developed:

• creative scientific or entrepreneurial genius, whether one individual or a larger development group;

• internal groups engaged in brainstorming or visioning exercises.

These sources may be expanded with inputs from various "voice of the customer" systems:

• root cause analysis of product complaints;

• observation of product or service use by customers;

• qualitative in-depth interviews with customers/end users;

• customer focus groups, directly asking for suggestions.

This process may also be guided by any of a variety of structured product concept development processes.

Product feature development is an expansive process. In some cases hundreds or even thousands of potential feature changes and variations are generated through these techniques. Some of these features are clearly understood by the product development team. Others are not. Some are fairly easy to deliver, others are fraught with technical and cost challenges. At this point it may become necessary to do some feature triage – to decide which features to offer and which to leave behind.

Feature triage

At this point in the product development process companies begin to prune the list of features down to those that they believe are most critical to the introduction of a successful product. Again, the choice is to do this entirely based on internal wisdom, or, alternatively, to bring customers into the decision process – to give the customer a voice at the table in product feature decisions.

Feature triage often starts with affinity or categorization exercises to create feature families. Some features/families may be immediately eliminated because no reasonable/cost-effective means to provide the envisioned feature is available. For other features, an evaluation and planning process that relies heavily on internal experience and secondary data can be used to further help decide which features stay and which go.

When customers are brought into the decision process, one common technique is to ask them to rate the importance of a long list of potential features. However, customers may rate all of the features fairly high, with little differentiation. One weakness of this result is that it does not reveal the underlying structure of the feature in terms of how it will impact customer decisions to purchase the product and their eventual satisfaction with the product.

The Kano method[1]

Responding to this need, Professor Noriaki Kano addressed this question in his development of a measurement model that has now been named after him. The Kano model seeks to differentiate between features in four broad categories – between features that:

1. Must-be included
2. Are desirable – more is better
3. Are exciting – the "wow" factor, and
4. Yield indifference – "who cares?"

By understanding the role each potential feature plays in the purchase likelihood and eventual satisfaction of customers, organizations can maximize the business benefits of new products while avoiding unnecessary extras that would add cost but with little added benefit. The four Kano categories are described more fully below.

Exciting — While the absence of this feature has little if any negative effect, introducing it generates excitement and satisfaction. (These are also called latent features.) For example, a few years ago, cupholders were new to mini-van buyers and gave the first manufacturers who introduced them a temporary edge. Tamper-proof tops on containers in the consumer market are another example, as are the first portable computers.

Desired — These requirements correlate to satisfaction in a more or less straight-line fashion, where "none is bad, a little is good, and more is better." One example would be gas mileage in a car, where low mpg can result in customer dissatisfaction, higher numbers will improve on that, and (other things being equal) mpg that is higher still will take satisfaction even higher. Reliability and longevity are typical other examples.

Indifferent — Sometimes customers will say they want something, but in reality, it plays no real role in producing satisfaction. This type of requirement might occur, for example, around expectations like "good for the environment" or "help society" which can foster satisfaction in some contexts but have no effect in others.

Must-be — These requirements are necessary for a product to even be considered. They are the equivalent of "table stakes." Once that level is achieved, "more" has little or no impact on satisfaction. For example, an airline must meet certain standards or travelers will not fly on it. But once the standards are met, meeting higher standards may have little or no impact on satisfaction. (This obviously can vary by market segment.)

The Kano measurement model

The Kano survey process is designed to classify requirements into one of the four categories (exciting, desired, indifferent or must-be), and also to yield other valuable insights into customer needs. Although infrequently used as a measurement process, it is receiving more attention in current times.[2] Kano does this through a highly structured questioning technique that involves functional (positive) and dysfunctional (negative) question pairs to explore each feature being considered. For example, a functional question like "How do you feel if gas mileage is good (or some specific value)?" is followed by its dysfunctional equivalent – "How do you feel if gas mileage is poor (or a lower specific value)?"

An example of the paired questioning method

Functional
1a. If the gas mileage is 35 miles per gallon for highway driving how do you feel?
1. I like it that way
2. It must be that way
3. I am neutral
4. I can live with it that way
5. I dislike it that way

Dysfunctional
1b. If the gas mileage is 20 miles per gallon for highway driving, how do you feel?
1. I like it that way
2. It must be that way
3. I am neutral
4. I can live with it that way
5. I dislike it that way

Note: Other wording for the categories has been tried, with varying degrees of success. Also, particular care must be taken in different cultural settings to convey the proper ideas.

Stated importance

Very often a more standard importance question is asked in addition to the Kano pairs. This can be assessed by a variety of methods including the anchored 10-point scale, from "Not at all important" to "Very important." If time allows, or money is available for a separate survey process, we recommend asking importance using a constant sum measurement process. By asking respondents to distribute 100 points across a set of features based on how important the features are to them, we are able to achieve better variation between features.

• Data collection — Data for Kano analysis can be collected by means of standard survey processes, whether paper, telephone interview or Internet/Web survey.

• Data analysis — The Kano process includes a very specific approach for plotting responses in an evaluation table and then offers various methods for doing further analysis. The final result is an exceptionally clear set of statements about what customers want and the precise nature of those expectations. By helping make decisions on product function, this data can also guide the allocation of R&D resources and even the structure of production or service delivery processes. It yields a product/service bundle with functional characteristics that will maximize customer satisfaction, but without unnecessary extras that add cost but no further satisfaction gains.

For each pair of questions a new variable is created that classifies each respondent's answers to that pair of questions into one of the categories used below. Those new variables can then be used in a variety of analytical procedures.

Customer Requirements					
	Dysfunctional				
Functional:	Like	Must-be	Neutral	Live with	Dislike
Like	Q	A	A	A	O
Must-be	R	I	I	I	M
Neutral	R	I	I	I	M
Live With	R	I	I	I	M
Dislike	R	R	R	R	Q

And the customer requirement is:

A: Attractive/Exciting

M: Must-be

R: Reverse

O: One-dimensional/Desired

Q: Questionable result

I: Indifferent

When analyzing at the aggregate level some companies classify the feature by its mode. In our view this approach ignores valuable information. We prefer to report the full frequency response of categories. We then work with our client to develop a weighting scheme for each classification. For example if the client thinks that a "must be" response is twice as important as a "one-dimensional/desired" response, then you could weight each "must be" a value of 10 and each "one-dimensional/desired" response with a value of five. Once a weighting scheme has been agreed upon an aggregate priority score can be calculated for each feature.

In addition to the basic classification decisions and representation, data can be analyzed and summarized in a variety of other ways.

- Significance testing between known segments can be conducted.
- If the data is translated into dummy codes it can be used for cluster analysis to develop need driven segmentation schemes.
- Stated importance can be integrated or considered separately.
- Data representation — It helps to keep the diagram on page 61 in mind while envisioning what customers are contributing to the feature triage process.

Observations and lessons

1. Like any measurement process, the clarity of thought that goes into the design foreshadows the clarity of results achieved. For the Kano method, proper specification of feature levels is critical. However, misspecification of feature levels is quite possible. We came across a situation where a feature fell into the "indifferent" category. When we analyzed it further we found that customers described both the functional and the dysfunctional descriptions of the attribute as "must-be." Instead of seeing a new capability as a substitute for an old capability, customers felt that the new capability was a complement. They expected both features.

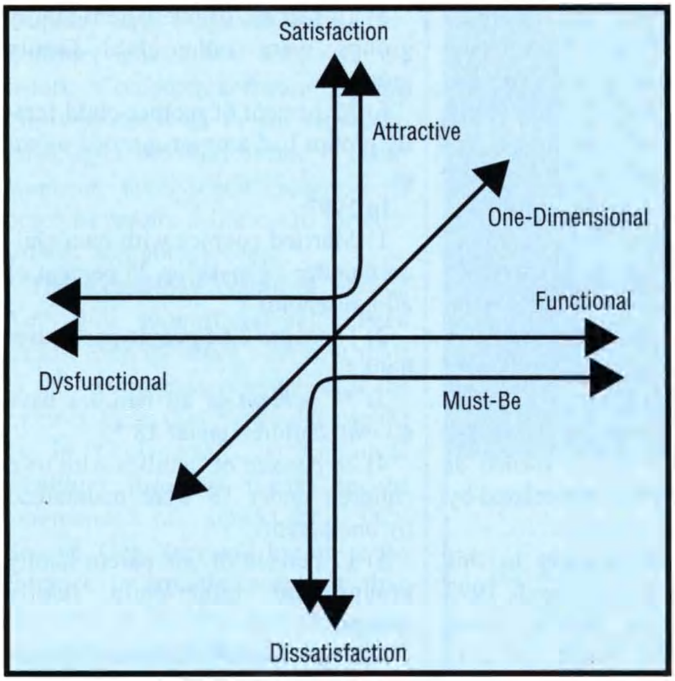
2. There is some flexibility in the way the paired functional/dysfunctional questions are asked. The gas mileage example provided above shows a form that has worked well for us.

3. While Kano is principally a measurement process, its effectiveness is increased if it is embedded in a structured consulting process in which the research practitioners are given a seat at the table during the feature development process. A full understanding of what the development team is seeking is critical in constructing the proper questions. Similarly, once the results are back, the practitioner should be prepared to work with the development team to interpret the results and the light they shed on the program's next steps.

4. Muddied results can sometimes be due to confusion in the underlying market segmentation on which the Kano data are drawn. If basically dissimilar market segments are represented in the sample, the fact that the results are difficult to interpret may mean that one segment views the attribute in a different light than the other segment's respondents. The solution, of course, is to anticipate segmentation possibilities for the product early on in the design stage of the Kano process. By including potential segmentation variables from databases, or asking segment identification questions you increase your ability to clarify the results through analysis.

Link to conjoint

Kano may serve as a precursor to a conjoint analysis[3] study, a powerful technique for assessing the impact of various levels of feature dimensions on customer preference. Conjoint studies give valuable insight into the interaction of various features and their levels, but it suffers from expo-



nential growth in possible combinations as features and levels are added. Kano is better at dealing with a large number of features, though one dimension at a time. Kano is also far less complex to administer. Kano is a process whose question form makes intuitive sense to clients and respondents, a significant factor especially in business-to-business research. Finally, Kano may prevent you from wasting conjoint resources varying the level of a "given" variable, thus releasing you to focus the conjoint analysis on combinations of desired or exciting features.

Links to CVM

In a related article[4] along with many other sources[5], customer value management (CVM) has been used to provide strategic navigation to an organization, enabling the organization to differentiate itself and grow its business by providing greater relative value in the marketplace. Customer value attributes at the broadest level consist of the benefits customers expect and the costs they anticipate paying. Each of the benefits translates into lower-level attributes expressed in the product/service bundles the organization delivers to the marketplace. Basically, the Kano method becomes a precise technique for assessing the role of prospective product features in supporting the overall strategic directions of the organization, as presented in its customer value equation.

Achieve goals

By responding to customer requirements in the product/service development process, a company can achieve its ultimate customer satisfaction goals more easily. Once the set of features for the new product is identified, the Kano method offers a way to bring customer input formally into the product development process. Including customer requirements up front makes it more likely that customers will purchase the product, and, in the end, be satisfied with it. Kano studies can aid in choosing a more focused set of attributes for a conjoint study. And finally, Kano studies may also be used to clarify the structure of product features that feed into broader product/company attributes used in CVM evaluations.

[1]See *Center for Quality Management Journal*, 2, 4, Fall 1993. "Special Issue on Kano's Methods for Understanding Customer-defined Quality."

[2]Lee, Mark C., and Newcomb, John F. Applying the Kano Methodology to Meet Customer Requirements: NASA's Microgravity Science Program. QMJ 97 4, no. 3, 95-109.

[3]Green, Paul E., and Krieger, Abba M. "Using Conjoint Analysis to View Competitive Interaction through the Customer's Eye": in 1997. Wharton on Competitive Dynamic Strategy, editors, George S. Day and David J. Reibstein, New York, Chichester, Weinheim, Brisbase, Singapore and Toronto: John Wiley & Sons.

[4]Farace, Vince and Meola, Jeri. Gaining strategic business advantage through customer value measurement. *Quirk's Marketing Research Review*. October 1997.

[5]Gale, Bradley T. 1994. *Managing Customer Value: Creating Quality and Service that Customers Can See*. New York, N.Y.: Simon & Schuster.

Survey Monitor

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Family composition stabilized in the '90s

Traditional families — married couples with children — have begun to stabilize as a percentage of all families in the 1990s and the growth of single-parent families — those maintained by a mother or father with no spouse present — has slowed, according to a report from the Commerce Department's Census Bureau. The report, Household and Family Characteristics: March 1997, P20-509, is available on the Internet at www.census.gov/population/www/socdemo/hh-fam.html.

"The perceived decline of the American family is vanishing and the '90s represents a stabilization period," says Ken Bryson, co-author of the report. "For example, the percentage of married couples with children fell from 50 percent to 37 percent of all families between 1970 and 1990. It only dropped one percentage point (to 36 percent) since then."

"Growth in the proportion of single-parent families had slowed in the meantime," says Lynne Casper, the report's other author. "The percentage of single-parent families doubled between 1970 and 1990, from 6 percent to 12 percent of all families," she says. "Since 1990, it has only increased two percentage points (to 13 percent)."

A "family group" includes all family living arrangements: families, related subfamilies, and unrelated subfamilies. A household is a person or group of persons who live in a housing unit. A family is a group of two or more people (one of whom is the householder, the person in whose name the housing unit is owned or rented) living together and related by birth, marriage or adoption.

Most of the information in this report comes from the March 1997 Current Population Survey. Some estimates may be based on data obtained fom earlier surveys conducted by the Census Bureau. As with all surveys, data are subject to sampling and other sources of error.

In 1990:

1) Married couples with own children under 18 made up 26 percent of all households.

2) There were 2.63 people per household.

3) 51 percent of all families had no own children under 18.

4) 24 percent of families with own children under 18 were maintained by one parent.

5) 14 percent of one-parent family groups were father-child family groups.

6) 33 percent of mother-child family groups had a never-married mother.

In 1997:

1) Married couples with own children under 18 make up 25 percent of all households.

2) There are 2.64 people per household.*

3) 51 percent of all families have no own children under 18.*

4) 28 percent of families with own children under 18 were maintained by one parent.

5) 17 percent of one-parent family groups are father-child family groups.

6) 41 percent of mother-child family groups have a never-married mother.

(*These values for 1997 are not statistically different from the values for 1990.)

Gen X optimists will propel Internet into the mainstream

Gen X adoption of PCs, new media, and electronic commerce will play a crucial role in moving the Internet into the mainstream, according to a new report from Forrester Research, Inc., Cambridge, Mass. Drawing on survey data from 120,000 North American consumers, Forrester has identified the technology optimism inherent in each new generation as the driving force behind this trend.

Each generation has its technology optimists - the people who adopt and proselytize high tech products. Forrester looked at three generations of optimists — Gen Xers, Boomers, and seniors — and concluded that Gen Xers will embrace and evangelize the Internet as a mainstream technology in much the same way as Boomers have with television and seniors with radio. "Optimism is what drives technology purchases and Internet commerce; therefore, locating technology optimists is essential for vendors and on-line marketers to succeed," says Meghann MacKenzie, Forrester analyst and author of the report. "Computer, software, and on-line vendors need to tap into optimists' ages and motivations — entertainment, family, and career — in order to predict a life cycle for consumers' technology needs."

The technology optimism of Gen Xers will support several related trends, each of which will contribute to the mainstream emergence of the Internet. First, Gen Xers will close the gap in PC ownership, catching up to wealthier Boomers thanks to the emergence of sub-$1,000 PCs. Second, Gen Xers will log on to the Internet in greater numbers than Boomers or Seniors. Forrester's survey data indicates that 82 percent of PC-enabled young optimists already use the Web on a regular basis, compared with 65 percent of Boomers with PCs. Finally, Gen Xers are far more likely to make on-line transactions and to use the Web for pre-purchase research. "Over the next few years, Gen Xers, Boomers, and seniors will evolve differently, using the Internet in distinct, specialized ways," says MacKenzie. "The Internet will increasingly become a lifestyle choice for Gen Xers, distinguishing them from Boomers, who will turn to the Internet for time-saving applications that cater to career and family needs. The few seniors on-line will use the Internet primarily for communications and community. To win on-line customers, marketers need to key into these distinctions."

The report, "Generational Optimism," is part of a series of quantitative studies from Forrester's Consumers & Technographics research service. The study uses Forrester's Technographics segmentation scheme, which classifies consumers by the motivations, attitudes, and income they bring to their adoption and use of technology. Data for the report was drawn from a survey of 120,000 North American consumers and was conducted with the NPD Group in the fall of 1997. For more information visit the company's Web site at www.forrester.com.

Consumers stick with banks for financial services

Although the myriad mergers in the financial industry appear to be blurring the lines between full-service banks, credit unions, savings and loans, and brokerage houses, the findings of a national study recently conducted by the research subsidiary of Aragon Consulting Group in St. Louis shows that those lines are still pretty clear in the minds of consumers.

"Our study reveals that consumers continue to turn predominantly to banks, credit unions and savings and loans for traditional banking services, such as checking, savings and home mortgages; however, when it comes to investing in mutual funds and annuities, they're more likely to call on a broker, than their banker," says Gary Miller, chairman of Aragon Consulting Group, a management consulting firm.

"For instance, we found that 62.4 percent of checking accounts are maintained at full-service banks, 20 percent at credit unions, 12.7 percent at savings and loans, and 4.9 percent at brokerage firms," says Miller. "And, 46.1 percent of basic savings accounts are kept at full-service banks, 32.6 percent at credit unions, 15.4 percent at savings and loans, and 5.9 percent at investment companies."

The Aragon study reveals that the service most predominantly used by patrons of full-service banks is checking (90.4 percent of bank patrons) and the second-most popular service at banks is savings (68.2 percent). These are also the most popular service offerings of credit unions and savings and loans, although in reverse order.

Approximately 87 percent of credit union customers participating in the Aragon study say they have a savings account at their credit union and 52.5 percent mention having a checking account there. Similarly, 61.9 percent of savings and loan customers interviewed by Aragon's research subsidiary say they maintain a savings account at a savings and loan, and half say they have a checking account there.

Among full-service bank customers, the most infrequently mentioned services are mutual funds (8.5 percent) and annuities (6.3 percent). The same is true among credit union and savings and loans customers, although the percentages vary slightly.

"As we saw in our study, people, who invest for retirement today — beyond a basic savings account, pension, 401(k) plan, and the like — are more inclined to turn to a brokerage firm for mutual funds, annuities, etc. than a bank," says Miller. "From among the financial institutions studied, the investment houses have 60.3 percent of the mutual fund accounts, while full-service banks have 22.8 percent — and that number shrinks to as little as 7.4 percent at savings and loans."

The study shows that 60.7 percent of brokerage customers invest in mutual funds through a broker, and 42.2 percent say they have a money-market account with their broker. A basic savings account was subjugated to being the fourth-most mentioned service for which consumers use a brokerage house. The two least-mentioned services were ATM cards (7.4 percent) and home mortgages (5.2 percent).

For full-service banks, credit unions and savings and loans, the third-most frequently mentioned service is the ATM card, although this service directionally becomes less popular with older segments of the population. The same is true with debit cards, although used by a considerably smaller portion of the population.

A national random sample of 400 was drawn to complete the study, which produced results within a ±5 percent margin of error. For more information call 314-726-0746.

Large-screen televisions show moderate gain

More than 17 percent of American households now have large-screen televisions, according to Decision Analyst Inc., an Arlington, Texas, research firm.

In its nationwide survey of 6,490 households, Decision Analyst found large-screen televisions — defined as 30 inches or greater — in 17.3 percent of U.S. homes. In a similar survey conducted last year, 13.3 percent of households had the large screen televisions.

"With the economy as strong as it is, it is a bit surprising there isn't more growth in sales of large-screen televisions," says Jerry W. Thomas, president/CEO of Decision Analyst Inc. "But you have to remember television is facing increasing pressure from computer games and on-line services, while leisure time continues to shrink."

The survey found that households headed by someone 18 to 34 are most likely to have large-screen televisions (21.4 percent), while households 55 and older are least likely to have them (13.2 percent).

By income, households with earnings of $50,000 or more annually are most likely to have the larger screen televisions (24.1 percent). Correspondingly, those with a high level of education — at least some college training — are most likely to have large-screen televisions. By census region, large-screen televisions are most popular in the West (19.8 percent of households), and least popular in the Midwest (15.9 percent). For more information call 817-640-6166.

'Made in USA' is still tops for American consumers

Eight out of 10 American consumers say when it comes to quality products, no one does it like the U.S., according to a study by CDB Research & Consulting, New York. "When compared with products made in other countries, U.S. consumers feel that U.S. products are of the same or better quality than products made anywhere else," says Dr. Larry Chiagouris, managing director of CDB Research & Consulting, Inc.

The survey found 76 percent of adults surveyed reported U.S. products are the same as or better than goods produced in Western Europe, 75 percent says U.S. product quality beats goods made in Asia, and 81 percent thought more of U.S. products than those exported from either Eastern Europe or Latin America.

"The globalization of the American economy and the advent of NAFTA has rekindled the sometimes nationalistic, often emotional debate over the quality of American-made goods versus those made abroad. It seemed, for a number of years, that American consumers were more interested in foreign-made goods than those made in the U.S. because of perceived differences in quality as well as price," Chiagouris says. "Today, however, we've found that 'Made in U.S.A.' means 'Made Better' to American consumers."

In terms of foreign-made goods, the survey found that Americans have a better perception of products made in Western Europe than those manufactured in Eastern Europe or Asia. Products in Latin America have the worst reputation among U.S. consumers, when compared with U.S.-made products.

Men are more favorable than women toward products made in Western Europe and Asia, the survey found, while women have a better opinion of products made in Eastern Europe, and Latin America. Older Americans are the most likely to feel that products made in Europe and Asia fall short compared with U.S.-made products, according to the research. According to CDB's survey, the most affluent Americans are the least negative about products made in countries outside the United States. For more information call 212-367-6866.

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groups of related questions and present that information on a single screen, the Perception Analyzer lets the moderator or facilitator look for trends and patterns in the results. Summarizing the results of questions, from a few to over 20, on one graph eases interpretation and group discussion of results. Updated features include new summary types, new editing features and new graphic displays. For more information call 800-769-0906 or visit the company's Web site at www.cinfo.com/.

Price of Internet search tool halved

The WebTools Company, Vermillion, S.D., has cut the price of Mata Hari, its Internet search tool, to $34.95, a reduction of 56% from the product's initial $79.95 release price. All prior purchasers will be rebated the difference. In addition, Mata Hari now "talks" to over 140 different search engines, a feature which is part of the new version 1.02 upgrade that also adds other features like the ability to force Boolean operation from any search engine. These search capabilities have been packaged into 42 different channels — or search service groupings — to make it easier for the neophyte to advanced Internet user to find information. For more information visit the firm's Web site at http://thewebtools.com.

Ranking system for banks, credit unions

A ranking system for financial institutions is now available on the Web at no cost. Using a simple five-star Quality Ranking and Best Rate Awards, RateNet evaluates 35 key financial ratios and provides a daily ranking of 11,000 institutions for deposit and lending rates nationally, statewide and locally.

Best Rate Awards are evaluated daily on RateNet for 29 banking products including mortgages, auto loans, credit cards, money markets and certificates of deposit. Blue (daily), silver (quarterly) and gold (annual) awards are assigned to institutions offering above average rates in their market with a Quality Ranking of at least four stars.

A detailed explanation of each institution's Quality Rank is explained in RateNet's Financial Reviews, a five-page report published by IDC Financial Publishing. The in-depth reports provide unique insights into the current financial condition of any institution, as well as its operating and financial strategies.

Quality Rankings, Best Rate Awards and individual rates are available on RateNet for over 11,000 institutions in 175 markets nationwide at no cost. RateNet is published by DataTrac Corporation, a privately held market research firm in Milwaukee, Wis. For more information call 414-223-2300 or visit the company's Web site at www.rate.net.

Senecio adds Java applets to its CATI software

Senecio Software, Inc., Bowling Green, Ohio, is now shipping ePoll, a Web survey package, as part of its line of computer-assisted interviewing software. This Java applet is capable of serving complex, adaptive questionnaires over the World Wide Web. In addition to the software, Senecio is also offering on-line market research services including questionnaire construction, Web survey hosting and custom programming services.

The ePoll Java applet survey engine, in tandem with Senecio's questionnaire editor, enables anyone to serve their ePoll-ready questionnaire over the World Wide Web in minutes. Key features include: integration with other surveying modules; integration with database records; professional questionnaires;

multilingual questionnaires; and secure answers. For more information call 419-352-4371 or visit the company's Web site at www.senecio.com.

Joint venture yields new electric markets survey

RLW Analytics, Inc., a Sonoma, Calif., energy information services firm, has formed a joint venture with Pine Company, a Santa Monica, Calif., research firm, to provide a syndicated survey of electric market changes and developments. The quarterly survey for the business and consumer markets, titled The RLW/Pine Electric Markets Survey, provides market intelligence for companies competing in the deregulated electric business. Data and analysis includes market share, churn, customer satisfaction, barriers to market entry, advertising awareness, building characteristics, load profiles, and more. The data is collected from a national sample of approximately 4,000 respondents. In addition to reporting on data and trends, the survey offers discussion on the implications of the findings. Market share information for each electric provider is presented by geographic region and building type, and can be integrated easily with other available demographic and firmographic information. For more information contact Ed Erickson of RLW Analytics at 707-939-8823 or at ede@rlw.com, or Ed Sugar of Pine Company at 310-815-5721 or at esugar@pinedata.com.

Develop product, company and domain names on the Internet

The Namestormers, an Austin, Texas, name generation firm, is now offering an Internet-based interactive service for creating product and company brand names as well as Web site domain names. For $15, anyone can access the new Namewave service and generate up to 200 name ideas. Users select the appropriate subject categories from Namewave's list of choices. Namewave immediately generates up to 40 names for review. Once a user has completed his or her review, another 40 names can be generated using the same or a different set of subject categories. This process can be completed up to five times for a single $15 fee. Namewave can also check favorite names against a database of existing .com domain names for availability. For more information visit the company's Web site at www.namestormers.com or call 512-246-1814.

Free focus group checklist

InModeration, a Philadelphia qualitative research firm, is offering a free eight-page focus group checklist. The InModeration Focus Group Checklist contains over 65 suggestions on how to implement successful focus groups. The following topics are covered: ways focus groups can enhance marketing efforts; key steps to running a successful focus group; and advantages and limitations of focus groups. The checklist also has tips on moderator selection, effective observation, and participant recruitment and selection. For a free copy call 215-871-7770.

New PR measurement tool

Ketchum Public Relations Worldwide Research and Measurement Department is offering the Ketchum Relationship Index, a new public relations measurement tool designed to enable organizations to gauge their success in enhancing relationships with their employees and customers. The Index consists of three data collection components: 1) qualitative research with employees to initially explore their satisfaction and loyalty levels, followed by 2) quantitative research with employees to more precisely measure and document their actual satisfaction and loyalty levels, leading to 3) quantitative research with customers to measure and document their actual satisfaction and loyalty levels. Once that information has been collected, factor analysis and perceptual mapping are used to show which factors most influence employee satisfaction and dissatisfaction and which factors most influence customer satisfaction, dissatisfaction and retention. For more information call Walt Lindenmann at 212-448-4213 or e-mail walter.lindenmann@ketchum.com.

One-stop GIS software Web site debuts

AppsData — Desktop Mapping Applications & Data Superstore has opened on the Web at www.appsdata.com. The site is designed to be a one-stop store for users to find desktop mapping software. The software is indexed by base product, industry, and application. Users may also do a keyword search of product descriptions. Orders may be placed via credit card on-line or by fax, or by check through the regular mail. Orders are immediately e-mailed to vendors for processing.

On-line energy information database

AEP Communications, Columbus, Ohio, a subsidiary of American Electric Power, is now offering Datapult, a new portfolio of energy information services designed to help commercial and industrial customers track and manage energy consumption. Datapult monitors electricity, gas, water, steam, compressed air, temperature and other information. Datapult comprises four major elements: Datapult Information Source gathers data tailored to the customer's needs; Datapult Central, AEP's secure Internet site, displays the information by entire company, business unit, site or process; Datapult Analysis analyzes energy use for critical events and providing access to special analysis tools for the customer's use; once critical events are identified, Datapult Notification will alert customers via pager, e-mail, electronic signal or fax. For more information call 877-328-2785 or visit the company's Web site at www.aep.com/datapult.

Software package predicts buyers' responses

DSS Research, Arlington, Texas, is offering Dominator 2000, a software program that analyzes and predicts buyers' responses to changes in the product or services offered in the marketplace. The software is based on conjoint analysis data which places specific value or utility on each feature that describes a product or service. Different utilities are calculated for each demographic, geographic or psychographic segment, so their preferences can be analyzed along with the total group. As the product or service is described on each of the key features, the overall desirability of that product is estimated and compared to all other products in the market simulation. Dominator 2000 enables users to: forecast the effects on market share of changes to existing products; create new products by varying cost, benefit and other characteristics; design a product line that minimizes cannibalization of current products, while maximizing total market share; develop products for specific market segments; determine which product design concepts work; assess the impact of new competitive products. For more information call 800-989-5150 or visit the Web site www.dss-research.com/library/Dominator/dominator.htm. Then, click on the demo link at the bottom of the page and enter "mduser" as the user name and "view1297" as the password to access the help files.

New financial samples from Polk

The Polk Company's Research Sampling Group has introduced new selections from its databased samples specifically intended for financial marketing research. The files feature data derived from several new questions recently added to Polk's Survey of America. Consumers are asked how they buy stocks/bonds and mutual funds, what their typical one-time investment is, how much they plan to invest in the future and which firms they use for mutual fund investing. Survey of America reaches approximately 1.5 million individuals each month. In other news, the Research Sampling Group is now offering 24-hour turnaround on standard non-automotive orders. For more information call 888-225-1434.

OLAP interface, sampling software from SPSS

SPSS Inc., Chicago, has announced the SPSS for Express interface. This new, no-charge interface, which provides another data connection between SPSS and OLAP software products, is available on the SPSS Web site. SPSS for Express enables users to access data contained in Oracle Express for use in data analysis and by data mining software from SPSS. Also new from SPSS is WesVar Complex Samples 3.0, which provides statistical results from data collected by complex sampling, such as in public opinion polls. While most analysis software calculates statistics as if all elements of the population had equal and independent chances of being drawn, WesVar Complex Samples uses information about the sample design to produce correct estimates of statistics and their standard errors. It features the replication method for variance estimation. Formerly available from Westat, a Washington, D.C.-area research firm, WesVar Complex Samples 3.0 was developed by Westat and SPSS Inc. For more information call 312-329-2400 or visit the company's Web site at www.spss.com.

Data Use

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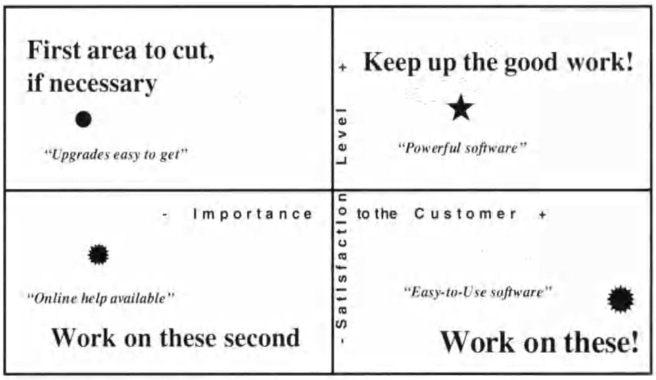
Work" ratings of high importance and satisfaction appear in the upper-right quadrant. Inevitably, though, there are some plot points in the lower right quadrant — the "Problem Areas," where product features are important to customers but are not measuring up. This is where you should focus resources to improve satisfaction ratings. The upper left quadrant shows features whose satisfaction ratings are high, but importance is low. This is where you could trim resources and redirect them to features that are more important to your customers.

Figure I: Sample of a two-by-two graph depicting hypothetical results of derived importance analysis for a software manufacturer.



Why the mathematical cloak-and-dagger? Why not just ask survey respondents to rate the importance of all features as well as satisfaction? Direct questions don't work in these cases. Very often, survey respondents will tell you that everything is important. (Picture yourself answering the following questions for a health insurance plan: How important are low premiums? How important is flexibility in provider selection? How important is quality medical care?).

Designing the survey

Carefully designed surveys are the key to successful application of derived importance analysis. While there are schools of thought to the contrary, we typically place the question rating overall satisfaction with the company or products up front in the survey. In this way, we get the customer's true read on general satisfaction, before they are (perhaps) influenced by subsequent questions focusing them on specific product features.

Giving respondents an odd-numbered ratings scale ensures that they are not forced to choose a rating on one side or another of the scale. For example, if you had only a four-point scale and a respondent was truly neutral on the feature, he would be forced to choose either a "two" toward the poor ratings side or a "three" toward the excellent ratings side. Neither would be a true reflection of his feelings. But give him a five-point scale, and he'll most likely choose a "three."

It's important to put a lot of thought into deciding what features you want customers to rate. For this, we typically execute qualitative research among the client base to define and refine the list of features to test in the quantitative survey. If you give respondents too lengthy a list of features to rate, they may be daunted by the survey length, and your response rates might suffer. We've found that responses begin to wane after five satisfaction rating questions. If you are testing a captive audience (like an internal employee group), or you have a group of very eager respondents, you may get away with a lengthier list.

In some cases, the two-by-two graph results aren't always a clean, neat division of plot points within the four quadrants. What do you do if you have clusters of features near the midpoints? When this happens, we generally go back to the data and look at various segments. In some cases, one segment could be skewing all the data. (That's another reason it's important to keep the survey at a reasonable length: the greater number of responses, the more you can go back to the data and segment without losing statistical significance.)

A case study

In 1997, we conducted a benchmarking customer satisfaction survey for a client in the book-publishing field. The client was most interested in determining how customers perceive them overall, and how satisfied customers were with their individual products. We performed derived importance analysis on the survey data to illustrate to our client how customers perceived their performance on various product features, and which of the features contributed most to the customers' overall satisfaction ratings.

While the client knew prior to the survey that they had a couple of "problem" areas to address, the derived importance analysis and two-by-two graph yielded an unpleasant surprise: Customers rated contact with salespeople as very important, but gave our client's salespeople a rather low satisfaction rating. As the customer relationship is critical for repeat business and referrals, our client took swift action. Within a year, they had reorganized their sales force and shifted their focus to more consultative selling, in which the salesperson maintains a close relationship with the customer even after the sale has closed. The following year, when our client conducted their second survey, satisfaction ratings for the sales process were significantly higher and more in line with the importance ratings.

Without derived importance analysis, this publisher may not have discovered this hidden problem until it was too late to gain back lost market share. And, by committing to a regular benchmarking survey of their customer base, our client is able to measure the success of their efforts.

With a little thought up front, derived importance analysis can be conducted on any survey data. When your products and budgets are on the line, it's too good a tool not to use.

GTE

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addition of new questions. The monthly report that is distributed to management and operations is sometimes modified slightly to increase its communication effectiveness.

This monthly discussion is only the launching point of the improvement process. Both Zajac and McLaughlin take the reports with the results of the reviews and meet with their staff to formulate and evaluate actions for improvement. Goals are set and tracked as an ongoing process.

A final element in this system is the "Hot Line." If any individual survey discloses a totally dissatisfied answer or three somewhat dissatisfied answers, this creates a Hot Line which is transmitted directly to the coordinator of the program, Paul Rondina, manager of customer/quality programs. He evaluates each one, creates a "ticket," assigns it to a specific individual, and enters the details into an on-line monitoring system. Periodic summary reports assessing the status and disposition of each ticket go to McLaughlin, Zajac and Kerns.

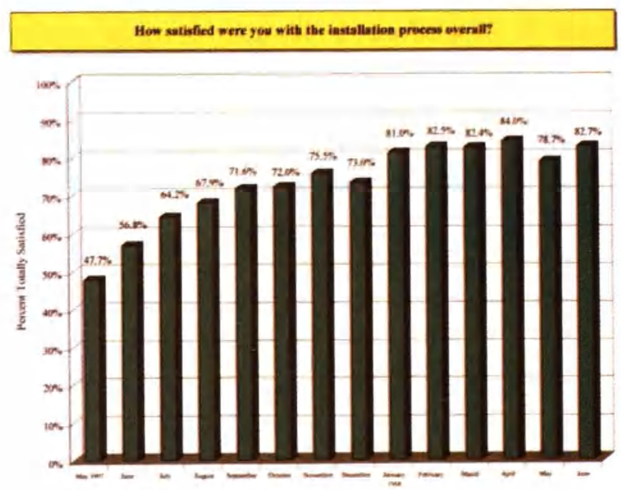
Identifying causal factors

One of the keys in focusing the effort for improvement is the quantification of the impact of each of the measured attributes upon overall satisfaction. An importance ranking from the respondent is not sought, as a customer's sense of priority tends to be relatively inconsistent. Nor does a low percentage of customer satisfaction necessarily identify an area that deserves significant attention. The approach used by Development II is to analyze the results using neural networks. This provides not only a ranking of the drivers of satisfaction, but a quantitative relationship that characterizes the impact that improvement in the specific attributes will have upon the customer's overall satisfaction. This causal analysis is completed approximately twice a year. The following example illustrates this process and explores the results that were obtained.

As part of the Internet Advantage service GTEI provides the equipment for the site as well as the hub connection, but it depends upon the local telephone company to install the dedicated line. This is typically a 56K, frame relay, T1 carrier or T3 carrier connection. While it can happen within 30 days or less, occasionally it extends to 45 days and beyond.

The results of the initial customer satisfaction surveys for installation indicated that only 48 percent of the customers were totally satisfied with the installation. This was unacceptably low. Clues for the problem abounded. The satisfaction with the time to install was relatively low, a fact echoed by customer comments. One would guess that reducing installation time would solve the problem. The neural network analysis, however, pointed to a different culprit: communication with the Network Operations Center (NOC). At first this seemed to be a curious result, but during the regular monthly customer satisfaction

Figure 1



meeting, this issue was discussed and a hypothesis emerged that expectations (for installation time) established during the sales process were unrealistic. The survey was therefore modified with additional questions to probe the customer's expectation of installation time versus the actual time it took.

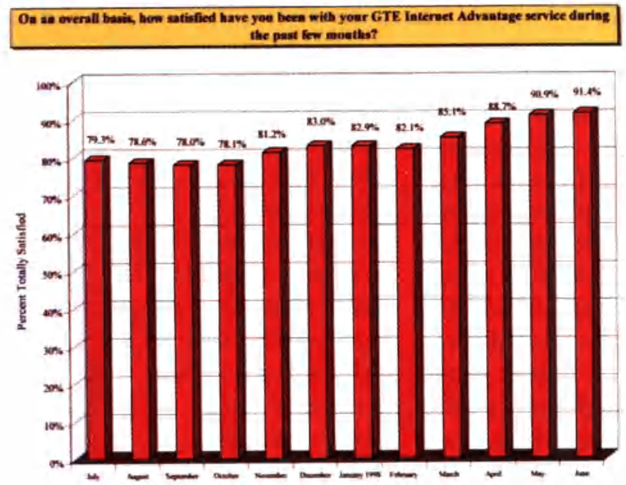
At the next monthly meeting the results were quite clear. There was a difference in expectations and actual times in many cases which contributed to dissatisfaction. The fix was relatively straightforward. Little could be done about decreasing the installation time of the dedicated line since this was controlled by the local telephone company, but expectations could be reset by the Network Operations Center based upon their most current knowledge of circuit installation interval.

After Zajac discussed this conclusion with his staff, the initial conversation with the customer was modified to provide a realistic installation time line. Evidence of this change appears in the satisfaction level in the survey within three months.

Several other areas were addressed by the same process during the year. The result was a dramatic change in overall satisfaction from 48 percent to 83 percent in less than 12 months (see Figure 1). It is interesting to note that the satisfaction with the "Time for Installation" changed very little and today still remains at the lower end of all of the satisfaction ratings.

The improvements in the overall satisfaction with the ongoing Internet connectivity service followed a similar increasing pattern (see Figure 2) This improvement was less dramatic only because the initial starting point was much higher. What is impressive is that now the overall satisfaction is in excess of 90 percent.

Figure 2



Critical ingredient

The highly focused feedback process that was discussed in this article is only part of the reason for the success of the improvement program. The clear message that comes from Kerns downward through the organization is that increasing customer satisfaction is his highest priority. This is a critical ingredient that is truly mandatory for a successful process. The results speak for themselves.

Improving the overall satisfaction for installation from 48 percent totally satisfied to 83 percent in less than one year is very unusual. Typically, movements in the level of satisfaction tend to be much more limited, even in highly focused customer oriented environments. A 10 percent increase in most cases would have been quite laudable.

Having over 90 percent of the customers totally satisfied with any service or product is similarly rare. Usually satisfaction measurements that reach these heights require that the percentage of totally and somewhat satisfied customers be combined.

Equally impressive are some of the other customer evaluations. A selection from the most recent report shows 99.7 percent of the customers totally satisfied with the "courtesy and professionalism of the NOC personnel" and 98.4 percent believing the service "met their quality standards during the past two months."

These exceptional results indicate what can be done with a highly focused process, dedicated senior management and an effective customer sensing program. Perhaps the greatest compliment came recently when a group from GTE corporate attended one of Kerns' monthly meetings to see for themselves if the satisfaction numbers were objective and real. They left as believers.

Reporting scores

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previous case, top box scores ignore the rest of the scale, potentially masking trends in bottom box scores.

To overcome this problem, in some cases researchers report both top two box and bottom two box scores. While this provides a more complete picture, it forces the manager to integrate two pieces of information for each attribute. This is especially hard when there are many attributes included in the study and, more important, when scores are compared across many attributes and locations.

Alternative format

The solution we developed for this situation was to create a single statistic which utilized both top two box and the bottom three box data from a seven-point scale. More specifically, we subtracted the bottom three box score from the top two box score to provide a single rescaled score that not only varied between attributes but also took both ends of the distribution into account.

Having constructed this new score, we took it a step further. Rather than just subtract the bottom three box score, we subtracted twice the bottom three box score from the top two box score. (Refer to the example below.)

This formulation has several implications. Marketing studies conducted by us and other researchers have shown that there exists an asymmetric effect on satisfaction. That is, the impact of negative attribute performance on overall dissatisfaction is higher than the impact of positive attribute performance on overall satisfaction. By using twice the bottom three box score, the formulation proposed here takes asymmetry into account by saying that a customer in the bottom box hurts a company more than the gain provided by a customer in the top box.

It also means that moving a customer out of the bottom two box is harder than moving a customer into the top two box. Therefore, the former achievement should be rewarded more than the latter. Because the bottom two box score is weighted to twice its value in this formulation, moving customers in and out of the bottom boxes has a greater impact on the scaled attribute score than moving customers in or out of the top boxes.

The number of scale points to be included in the top and bottom boxes is dependent on the scale used in the study and the distribution. Similarly, the extent to which the bottom boxes should be weighted (twice, thrice, etc.) is dependent on the particular study. But the principle remains the same. A single score is obtained that has more variation than the mean score, includes both ends of the scale and is weighted to include the asymmetric effect.

An example

Consider a company that has completed an attribute satisfaction survey with 100 respondents, where scores are measured on a seven-point scale.

Scale	Attribute 1	Attribute 2
7	41%	45%
6	30%	26%
5	10%	15%
4	5%	9%
3	7%	3%
2	4%	2%
1	3%	0%
Mean	5.69	5.95
Scaled Score	43	59

While there is a statistical difference between the means, for a manager the difference may not appear substantial. The top two box scores are the same for both attributes, and the top box scores are very close. If we use the formulation described here, the scaled score for Attribute 1 would be (71 - 28 =) 43 and that for Attribute 2 would be (71 - 12 =) 59. This is a substantial difference and it occurs because of the higher proportion of bottom box scores on Attribute 1 (even though the top two box score is the same).

Now consider what happens if for Attribute 1, 3 percent of the customers are moved out of the bottom three box while for Attribute 2, 3 percent of the customers are moved into the top two box. The score for Attribute 1 is now (71 - 22 =) 49 and that for Attribute 2 is (74 - 12 =) 62. While there is still a substantial difference, clearly Attribute 1 is seeing more movement in the score than is Attribute 2. Depending on the scale used in the study and the nature of the industry, the formulation can be varied to provide an appropriate score.

Comparative reporting

While the new formulation described here seems simple and intuitive, its usefulness does not become fully apparent until we consider a specific situation. Consider the situation that companies are increasingly facing where they need to not only measure the performance of different organizational entities, but also to compare the performance of the entities for evaluation purposes. An example of this is health plans that need to evaluate physicians or health facilities that are affiliated with them. Another example is of financial services companies that have branches in different parts of the country. We were faced with the latter situation where 20 centers belonging to a financial services company needed to be evaluated on a variety of attributes to determine the overall level of customer satisfaction with each center.

Each center was evaluated on a list of 10 attributes using seven-point satisfaction scales. For each attribute a rescaled score was calculated using the convention described previously (top two box score less twice the bottom three box score). Thus, when the centers were compared on a single attribute, those with high top two box scores and low bottom three box scores had the highest scores.

These attribute scores had to be made meaningful to the managers of the centers. To do this, they had to be expressed in a form that managers could easily understand. As a first step, the 20 re-scaled scores for Attribute 1 were averaged. Next, the average score for Attribute 1 was standardized by applying a multiplier to convert it to 75. Thus, centers scoring above 75 were above average on Attribute 1 and centers scoring below 75 were below average. The same process was applied to each of the other nine attributes. Thus, each center had a standardized score for each attribute and the mean for each attribute across centers was 75. We used 75 to denote the average score because it was felt that it would be in line with the perceptions of the managers who would ultimately look at the data. This average can be any number depending on the situation.

The attribute scores for each center had to be converted into a single score that was representative of the performance of the center, so that the centers could be easily compared. To do this, the scores on the 10 attributes for each center were averaged, to create an overall satisfaction score for each center. Since this makes the average of the overall scores across centers also 75, determining above and below average performance for each center is not hard.

This process provides many advantages. First, as explained in the previous section, centers with high top two box and low bottom three box scores are rewarded. Centers are rewarded more for moving customers out of the bottom boxes than for moving them into the top boxes. Second, the standardization allows each center manager to compare his score against all of the other centers without having to look at the individual scores for each of the other centers. Finally, the standardization to 75 allows each manager to clearly understand performance, since excellent scores ranged close to 100 and low scores were in the 60s or 50s. Using any of the existing methods would require the manager to process either more information or incomplete information.

Summary

In this article we have provided an alternative method of reporting customer satisfaction scores that incorporates the advantages of existing methods while avoiding some of the disadvantages. We have also demonstrated an application of this method by way of providing standardized comparative evaluation scores. This method will allow researchers to help managers understand the results of customer satisfaction studies better, by providing more information in an easier format.

Names of Note

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Texas.

Eric Cantor has been appointed senior vice president, sales & marketing, for the *McGraw-Hill Construction Information Group*, New York.

Cantor **Padilla**

Belkist Padilla has been promoted to vice president/director of qualitative research of Miami-based *Strategy Research Corp.*

Neal Hickman has joined *Answers Research*, Solana Beach, Calif., as research manager.

New York-based *Arbitron NewMedia* has appointed **Greg Verdino** vice president and general manager, Internet information services.

Jason Hill has been named a project manager at *Aragon Consulting Group*, St. Louis.

Clearwater Research, Boise, Idaho, has announced a number of promotions: **Krista Gragg** to research analyst; **Eric Holloway** to associate project director (field services); and **Andrew Warren** to computer programmer. The company has also added **Michael Smith** as human factors research analyst, **Craig King** as research analyst, **Shelah Koza** as research technician, **Marlin Roberts** as information systems manager, and **Jennifer Stanfield** as a human factors research intern.

Tim Rogers has been named president of *Maritz Marketing Research*, St. Louis. He replaces **Ron Lipovsky**, who has been appointed president of Maritz Performance Improvement Co.

RONIN Corp., Princeton, N.J., has appointed **Rob Elliott** senior software developer. **Cindy Dioszeghy** has been named software support specialist. **Paul Gold** has been named senior sales representative. **Dawn Rosso** has been named senior vice president of RONIN Research Services. At RONIN's London office, **Charles Whitlock** has been appointed senior sales representative.

Greg Rogers has joined *The Analytical Group* as manager of the firm's new Chicago telephone interviewing center. **Laura Snyderman** has also joined the Chicago office as a project director. **Sherri Martinez** has been promoted to project supervisor at the company's Scottsdale, Ariz., scanning facility. In addition, **Sherilyn Coyne** has been named data collection administrative assistant at the Scottsdale facility.

GroupNet, Palm Beach Gardens, Fla., has named **Jim Longo** executive director.

Research Industry News

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joined **Global Market Research,** a large international market research network, as the American affiliate. The affiliation provides SRBI clients with a network of established research company partners around the world.

MRCFocus, Las Vegas, has added a third suite of discussion rooms to accommodate large groups of 12 to 40 participants. The new suite of rooms offers a private client entrance to ensure client anonymity and closed-circuit viewing of the focus group process. In addition, the suite is equipped with audio/visual surveillance technology to capture participant expression and body language for analysis and review. For more information call Lisabeth Clawson at 702-734-7511.

Edison, N.J.-based **Schlesinger Associates** has opened a new focus group facility in midtown Manhattan featuring three focus group suites (each with large conference room, viewing room, client lounges and work stations), a fully-equipped kitchen and audio/video equipment. For more information call Lizabeth Clegg at 212-730-6400.

Singapore-based **Research Pacific** has changed its name to The Research Pacific Group to better reflect its expanded operations, current and planned, throughout the Asia-Pacific region.

Research International USA, New York, has acquired **Conway/Milliken & Associates** (CMA). To support both companies' data collection needs, CMA's existing CATI center has been expanded to 150 calling stations. CMA will function as a division of Research International USA and will remain headquartered in Chicago.

ICR/International Communications Research, Media, Pa., has opened a new branch office in St. Louis. David Hughes, who has joined the firm as vice president of client services, will head up the new branch. For more information call Steven McFadden at 610-565-9280.

Focus Two, Inc., Daphne, Ala., has opened a new focus group facility in the Mobile, Ala., area. For more information call Roberta Beauchamp at 334-625-0900.

Data & Management Counsel has relocated its headquarters office to 135 Commons Ct., Chadds Ford, Pa., 19317. Phone 610-459-4700. Fax 610-459-4825. The firm has also added a West Coast office at 3604 Fourth Ave., Suite 2, San Diego, Calif., 92103. Phone 619-683-9304. Fax 619-683-3820.

The survey research industry has rejected and labeled "extortive" the contractual relationship expressed in mailings from a Chicago-based organization, Private Citizen, Inc., requiring a $500 fee if any of its members receive a call to participate in an opinion survey. **The Council of American Survey Research Organizations** (CASRO), a Port Jefferson, N.Y., trade association, said that subject to federal and state law, survey researchers have a first amendment right to communicate with people. "Anyone who attempts to force survey researchers to pay money for what they have a right to do we believe commits the crime of extortion," says CASRO executive director Diane Bowers. "More importantly, survey researchers respect the individual's right not to be interviewed and will accept a refusal not to participate in a survey."

CASRO Chairman Richard Day says, "As professional researchers CASRO members must adhere to a strict code of standards and ethics that specifically requires balancing the right to privacy versus the need for research.

"For survey research to be reliable and to provide meaningful data, it must be able to sample a representative and projectable population and count both the people who refuse to participate as well as those who participate. Such a process guards against sample bias and thus the ability to generalize to the population," Day says.

In the Telephone Consumer Protection Act of 1991, the Federal Government recognized the distinction between telemarketing and legitimate survey research calls. The Federal Communications Commission released a report and order on Oct. 16, 1992, that specifically exempts research, market surveys and political polling from the TCPA requirements for do-not-call lists.

Tustin, Calif.-based **Scantron Corporation** and **Catapult Systems Corp.**, Austin, Texas, have signed a comprehensive agreement to develop and jointly market network survey systems and services. The agreement includes the licensing of Inquisite source and object technologies to Scantron, the joint development of enhancements to Inquisite technology, the development and deployment of Web hosting services, and the joint marketing of these products and services throughout the world.

Chris Van Derveer, president of **Van Derveer Industrial Research,** Philadelphia, is prepared to offer the following payment arrangement to new client firms. A deposit of half the project fee would be made up front. Upon completion and delivery of the final report, Van Derveer would receive the remaining half in client company stock, valued at the firm's own internal price structure. "The ideal candidate for the program would be a firm that markets a product that is sold to industrial buyers," Van Derveer says. "The firm has probably undergone a few rounds of financing from venture capital sources and plans to go public in a few years." For more information call 800-531-9025.

Doane Marketing Research, a St. Louis, Mo., firm specializing in agricultural marketing research, has agreed to purchase the assets of St. Louis-based **Harvest Research**. Harvest Research was founded by Roy Cleveland and John Mattingly and has been a provider of both syndicated and proprietary research services to agribusiness. Doane Marketing Research is a wholly owned subsidiary of Marketeam Associates Of Mo., Inc., a privately held marketing research firm.

Dallas-based **STREAM** has opened a facility for qualitative research in the north Dallas area. The facility includes a 30x17-foot focus study room with modular table, TelePrompTer, television/VCR, projection wall, surround/multilevel lights, built-in serving/presentation area, carpeted walls and moveable white board for presentation of product and ideas, in-room computer capability, and a viewing room with camera, and audio with operators for one standardized price. The facility is located at the Spring Valley exit off the North Dallas Tollway. It is supported by STREAM Agency, Inc., a provider of marketing support for consumer-based and business-to-business-based companies. For more information call Mark C. Grayson at 972-233-9005.

E-valuations Research, Seattle, and **2WAY**, a Seattle provider or marketing automation software, have entered an agreement to develop a comprehensive set of marketing survey tools for 2WAY's flagship product, Enterprise Suite v 2.1. The firms will develop a series of research survey templates. These templates will assist clients of both companies in developing their own on-line marketing studies for Internet, intranet and extranet environments. For more information call Tom Buehrer at 206-382-3387.

The Pennsylvania Federation of Business and Professional Women presented their Employer of the Year Award to **J. Reckner Associates, Inc.,** a Montgomeryville, Pa., research firm, at their 78th annual conference in June in Pittsburgh. The award is presented to an employer whose employment policies and practices are particularly supportive of women employees.

Field Dynamics Marketing Research has opened a third focus group suite at its Los Angeles location. The 22x20 respondent room features a large, modular conference table that can hold up to 15 respondents. When the table is removed the super room can accommodate 25 respondents in a classroom setting or up to 50 respondents theater-style. The two-tiered viewing room seats 10 to 12 clients. For more information call 818-783-2502.

In company earnings news for the second quarter, **Market Facts**, Arlington Heights, Ill., reported second quarter revenue increased 35 percent to $34.2 million from $25.3 million a year ago. Net income for the quarter rose 87 percent to $2.0 million from $1.1 million, and diluted earnings per share increased to $0.22 per share compared with $0.15 in 2Q 1997.

NFO Worldwide, Greenwich, Conn., reported a 38 percent increase in second quarter revenues to $65 million from $47 million in the same period last year. Net income for the quarter was $4.4 million, up 60 percent from $2.7 million last year. Diluted earnings per share were $0.20 compared to last year's $0.13 per share, an increase of 54 percent.

Information Resources, Inc., Chicago, reported second quarter net earnings of $3.4 million, $0.12 per diluted share, compared to net earnings of $2.1 million or $0.07 per diluted share in 2Q 1997. Consolidated revenues for the second quarter were $129.4 million, up 14 percent over 2Q 1997.

ACNielsen Corp., Stamford, Conn., reported a rise in net income of 57 percent, to $16.1 million, while diluted earnings per share reached $0.27, an increase of 50 percent over 1997. Reported figures include an after-tax expense of $1.6 million, or $0.03 per share, for Year 2000 computer modifications, and a negative impact of $2.4 million, or $0.04 per share, from foreign currency translation.

St. Louis-based **Quality Controlled Services** (QCS) has relocated its Denver telephone survey center to 3131 S. Vaughn Way in Aurora, Colo. Phone 303-695-1120. The new location expands the number of CATI stations from 70 to 82. QCS has also acquired a new call center in Kirksville, Mo., featuring 60 CATI stations. It is located at RR 3, Box 111A in Kirksville. Phone 660-488-5500.

Clearwater Research, Boise, Idaho, has been named 1998 Small Business of the Year by the Boise Area Chamber of Commerce. Clearwater was one of 17 businesses nominated in three categories (small, medium, and large). Businesses were judged on their quality of service, history of innovation, ability to deal with challenges, and overall stability.

Information Resources, Inc., Chicago, announced that its InfoScan Reviews, a syndicated scanner database, has been upgraded from sample-based to all-store, census-based data. The upgrade allows clients to work with data from 11,300 supermarkets and 7,500 drug stores, an increase from the earlier database of 2,700 food and 550 drug stores. Customers will also continue to receive sample-based information from nearly 300 mass merchandise outlets.

Mark Freeman Associates, a Cleveland, Ohio, marketing communications firm, has formed an integrated research group. For more information call Jeremy Patty at 216-361-1417.

Intellipost Corp., a San Francisco-based loyalty marketing firm, is expanding its BonusMail opt-in advertising service to include a set of market research tools provided by New York-based **CLT Research Associates**. BonusMail (www.bonusmail.com) is an Internet loyalty program that rewards consumers for reading targeted e-mail ads. Under the agreement, Intellipost will offer its advertisers CLT's research services, while CLT will use BonusMail to conduct research for its clients.

The Arbitron Co., Columbia, Md., has selected Fairfield, Conn.-based **Survey Sampling** as its supplier for the random-digit telephone samples used in Arbitron's radio audience surveys in the U.S.

New York-based **Research International USA** and **The Rouse Company**, a developer/owner/manager of regional shopping centers, have formed a partnership that will provide both companies with Internet-based access to retail/home shoppers. Through The Rouse Company's Premier Shopper Club — an interactive shopping experience, conducted at mall pavilions and on the Internet, which provides shoppers with exclusive offers, discounts and special services — Research International USA will be able to access 500,000 shopper club members who visit Rouse shopping centers each week to participate in panel research.

Roper Starch Worldwide Inc. and **Response Analysis Corp.** have signed a letter of intent to combine. Terms were not disclosed. The combined entity will be called Roper Starch Worldwide Inc., with Response Analysis operating as a division under its own name from its headquarters in Princeton, N.J.

National Survey Research Center has moved to a new facility featuring a focus group suite and 20 CATI stations. The new address is 5350 Transportation Blvd., Ste. 19, Cleveland, Ohio, 44125-5307. Phone 216-518-2805. Fax 216-518-2903. E-mail nsrc@NSRC.com.

A Philadelphia research firm has paid The Business Software Alliance — a watchdog group of software developers — $100,000 to settle claims that the firm had unlicensed software installed on its computers. In addition to the settlement payment, the firm agreed to delete any unlicensed copies, purchase any additional software necessary to be in compliance with copyright laws in the future and strengthen its existing software management policies.

Burke Strategic Consulting Group, Newton, Mass., and Atlanta-based Armstrong Laing Group have entered into a strategic partnership to provide consulting support for clients who purchase Armstrong Laing activity-based management software.

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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Quirk's MARKETING RESEARCH Review

1998 Customer Satisfaction

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Andrew Aitken, Research Director

ACG RESEARCH SOLUTIONS

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Pierre Laclede Center
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Fax 606-344-0078
E-mail: clint@allianceresearch.com
www.allianceresearch.com
Clint Brown, President

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www.amrsydney.com
Brian Fine, Managing Director

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Carlsbad, CA 92008
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E-mail: info@analytique.com
www.analytique.com
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(See advertisements on pp. 29, 53)

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(See advertisement on p. 90)

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Consumerdata Limited
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Fax 44-1372-278989
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Adrian Lawes, Director

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Ken Pia, President

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Fax 650-854-2135
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John Chisholm, President

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Rebekah L. Ashcraft, Owner

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Bill Tripp, Managing Director

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Louis Goldish, Managing Director

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M.V. Girardi, President

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(See advertisement on p. 93)

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Ph. 703-556-7748
Fax 703-356-1680
Gary Brown, Executive Vice President

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Fax 847-492-1584
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Alvah White, President

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Howard Waddell, President

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(See advertisement on p. 11)

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Karen P. Goncalves, President

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(See advertisement on p. 94)

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Fax 864-573-4348
E-mail: JBarrett@pmgco.com
www.pmgco.com
John Barrett, Partner

Product Q
A Service of Marketing Evaluations/TVQ, Inc.
1615 Northern Blvd.
Manhasset, NY 11030
Ph. 516-365-7979
Fax 516-365-9351
E-mail: info@qscores.com
www.qscores.com
Steven Levitt, President
Henry Schafer, Exec. Vice President

Since its inception in 1988, Product Q has become a leader in the field of brand equity measurement, featuring measures of consumer satisfaction. Twice a year, questionnaires containing brand logos are mailed to a national sample of adults, resulting in 1,800 completed interviews. Product Q Scores are available on almost 200 brands.
(See advertisement on p. 73)

Prognostics
Stanford Research Park
900 Hansen Way
Palo Alto, CA 94304
Ph. 650-812-3900
Fax 650-812-3919
E-mail: jcreel@prognostics.com
www.prognostics.com
Jim Creel

PTM Research, Inc.
325 E. Eisenhower Pkwy., Ste. 7
Burlington I Bldg.
Ann Arbor, MI 48108
Ph. 800-324-3216 or 734-741-1134
Fax 734-741-1206
E-mail: contactptm@ptmresearch.com
www.ptmresearch.com
Deborah Babcock, President

Pulso Mercadologico S.C.
Romulo O'Farril #593 y 599
Col. Las Aguilas
Mexico D.F. 01710
Mexico
Ph. 52-5-651-4823
Fax 52-5-593-0929
E-mail: pulmerc@data.net.mx
www.pulso.com.mx
Ana C. Covarrubias, Ph.D., President

QS&A Research & Strategy
1800 Diagonal Rd., Ste. 600
Alexandria, VA 22314
Ph. 703-518-4199 or 800-229-5489
Fax 703-567-7878
www.worldweb.net/~strategy/
Rebecca Quarles, Ph.D., President

Quest Marketing Group
400 Clifton Corp. Pkwy., Ste. 472
Clifton Park, NY 12065
Ph. 518-373-1990
Fax 518-373-4824
Glen D. Lasher, Owner

Quest Research
2900 N. Loop W., 10th fl.
Houston, TX 77092
Ph. 713-956-6569
Fax 713-956-2593
E-mail: maryjom@tqba.com
www.tqba.com
Mary Jo Martin, Vice President

QUESTAR

QUESTAR
2905 W. Service Rd.
Eagan, MN 55121-2199
Ph. 800-747-3073
Fax 651-688-0546
E-mail: webmaster@questarweb.com
www.questarweb.com
Julie Fontaine, Supervisor, Marketing Support

Specializes in customized assessment of customer satisfaction and customer value management - helping clients compare the value they offer with that of their competitors. We are a leader in linking management practices to long-term customer satisfaction, loyalty and retention.
(See advertisement on p. 3)

The Question Shop, Inc.
2860 N. Santiago Blvd., Ste. 100
Orange, CA 92667
Ph. 714-974-8020 or 800-411-7550
Fax 714-974-6968
Ryan Reasor, President

Rabin Research Co.
150 E. Huron, Ste. 800
Chicago, IL 60611
Ph. 312-482-8500
Fax 312-482-8069
E-mail: main@rabin-research.com
Michelle Elster, Vice President

RDA Group
450 Enterprise Ct.
Bloomfield Hills, MI 48302
Ph. 248-332-5000
Fax 248-332-4168
E-mail: Webmaster@rdagroup.com
www.rdagroup.com
Suzanne Battermann, Sr. Vice President

Research Data Services, Inc.
600 S. Magnolia Ave., Ste. 350
Tampa, FL 33606
Ph. 813-254-2975
Fax 813-254-2986
E-mail: KlagesMktg@aol.com
Walter J. Klages, Ph.D., President

Research Resources
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Ph. 602-371-8800
Fax 602-735-3270
E-mail: rrgroup@researchresources.com
www. researchresources.com
Paul Sherman, Vice President

Research Solutions
50 Wingold Ave.
Toronto, ON M6B 1P7
Canada
Ph. 416-781-5106
Fax 416-781-8937
E-mail: jonarnld@idirect.com
www.capsnap.com
Jon Arnold, President

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Fax 415-543-3553
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www.researchspectrum.com
Richard H. Snyder, CEO

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Fax 616-458-4376
E-mail: kvs@resors.com
www.resors.com
Kris Vanderstelt, Program Manager

Response Analysis Corp.
1060 State Rd.
P.O. Box 158
Princeton, NJ 08542
Ph. 609-921-3333
Fax 609-921-2611
E-mail: diane.linck@response-analysis.com
www.response-analysis.com
Jim Alleborn, Sr. Vice President

The Response Center
6908 Market St., 6th fl.
Upper Darby, PA 19082
Ph. 610-352-2800
Fax 610-352-7382
E-mail: admin@response-center.com
Patrick Baldasare, President/CEO

Rigney & Associates
2795 Clay St.
San Francisco, CA 94115-1711
Ph. 415-771-9357
Fax 415-771-9367
E-mail: jrigney@rigneyassoc.com
John Rigney, Principal

Robinson Research, Inc.
524 W. Indiana
Spokane, WA 99205
Ph. 509-325-8080
Fax 509-325-8068
E-mail: Robinsonresearch@icehouse.net
William D. Robinson, President

Rockbridge Associates, Inc.
10130 G Colvin Run Rd.
Great Falls, VA 22066-1839
Ph. 703-757-5213
Fax 703-757-5208
E-mail: rockinfo@rockresearch.com
www.rockresearch.com
Charles Colby, President

RONIN Corporation
103 Carnegie Center
Princeton, NJ 08540
Ph. 800-352-2926
Fax 609-452-0091
E-mail: ronin@ronincorp.com
www.ronincorp.com

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New York, NY 10017
Ph. 212-599-0700
Fax 212-867-7008
E-mail: info@roper.com
www.roper.com
Carolyn E. Setlow, Group Sr. Vice President

Ross Information Services
8820 N. Industrial Rd.
Peoria, IL 61615-1508
Ph. 309-691-9561
Fax 309-693-8774
E-mail: gwenc@concentric.net
Gwen Chandler, V.P. Marketing

Satisfaction Management Systems, Inc.
Baker Technology Plaza
5959 Baker Rd., Ste. 300
Minnetonka, MN 55345-5957
Ph. 612-939-4311
Fax 612-935-7815
E-mail: sales@satmansys.com
www.satmansys.com
Vince Farace, President

Scantel International
27 Dale Street
Manchester M1 1EY
United Kingdom
Ph. 44-161-236-1952
Fax 44-161-236-0768
E-mail: enq@scantel.compulink.co.uk
www.scantel.co.uk

SCANTRON®
SURVEY GROUP

Scantron Survey Group
1361 Valencia Ave.
Tustin, CA 92780
Ph. 714-247-2830
Fax 714-247-2874
E-mail: pmmiszko@scantron.com
www.scantron.com

Scantron Survey Group specializes in developing and executing custom survey programs to provide companies with the critical information they need from employees and customers. Scantron provides consulting services and project management from survey plan development to data analysis and presentation of results. Scantron also offers a multitude of development options including; printed forms, telephone interviews, automated telephone surveys, on-line surveys and kiosk surveys.
(See advertisement on p. 27)

Second To None, Inc.
110 N. State St.
Ann Arbor, MI 48104
Ph. 734-668-8148 ext. 101
Fax 734-741-8148
E-mail: jeffh@second-to-none.com
www.second-to-none.com
Jeff Hall, President

Service Excellence Group, Inc.
211 Stablestone Dr.
St. Louis, MO 63017
Ph. 314-878-9189
Fax 314-878-1818
E-mail: servicex@aol.com
Marci Bikshorn, President

Service Industry Research Systems, Inc. (SIRS)
201 Martha Layne Collins Blvd.
Highland Heights, KY 41076-1750
Ph. 606-781-9700
Fax 606-781-8802
E-mail: sirsinc@aol.com
Christopher Ohlinger, CEO

Service Research Corp.
6201 S. 58th, Ste. A
Lincoln, NE 68516
Ph. 402-434-5000
Fax 402-434-5006
E-mail: srcbritt@aol.com
Mike Britten, President

Service Strategies International, Inc.
12001 N. Central, Ste. 350
Dallas, TX 75243
Ph. 972-233-3010 or 800-344-6069
Fax 972-419-1555
E-mail: kmcgregor@servstrat.com
www.servstrat.com
Kathi McGregor, V.P. Operations

Since 1988, Service Strategies is a full-service marketing research and consulting firm specializing in customer and employee satisfaction, loyalty and retention studies. Qualitative techniques: telephone interviews, personal interviews, and focus groups. Quantitative capabilities include questionnaire design, sample selection, data collection (telephone, scanning, interactive voice response, e-mail and Internet). Concise, actionable reports. Clients include Baldrige and Texas Quality Award winners.
(See advertisement on p. 105)

Shaw Strategic Marketing
1033 Third Ave. S.W., Ste. 103
Carmel, IN 46032
Ph. 317-818-0400
Fax 317-818-0401
E-mail: shawmktg@yahoo.com
Ron Shaw

Shop'n Chek, Inc.
76 Perimeter Center E., N.E.
Atlanta, GA 30346-1801
Ph. 770-393-1072 or 800-669-9939
Fax 770-668-0816
E-mail: shaukohl@shopnchek.com
www.shopnchek.com
Sharon Forshee Haukohl, Dir. of Sales & Mktg.

Shugoll Research
7475 Wisconsin Ave., Ste. 200
Bethesda, MD 20814
Ph. 800-322-4499 or 301-656-0310
Fax 301-657-9051
E-mail: info@ShugollResearch.com
www.ShugollResearch.com

Sights On Service, Inc.
DBA Secret Shopper
3405 Kilmer Ln. N.
Minneapolis, MN 55441
Ph. 612-525-1460
Fax 612-595-0210
E-mail: LauraP@secretshop.com
www.secretshop.com
Laura Portinga, General Manager

Sorensen Associates inc

Sorensen Associates, Inc.
999 N.W. Frontage Rd., Ste. 190
Troutdale, OR 97060
Ph. 800-542-4321
Fax 503-666-5113
E-mail: wjhruby@sorensen-associates.com
www.sorensen-associates.com
William J. Hruby, V.P. Marketing

Sorensen Associates Inc. is a full-service research firm dedicated to conducting data collection at the point-of-purchase. Our corporate philosophy is to conduct an assessment in context, e.g., gathering consumer opinions at the retail shelf where purchase decisions and motivations are top-of-mind. Fielding in the retail environment offers a better quality interview, quicker study turnaround and more competitive pricing. Other benefits include: more specific demographic targeting (at the neighborhood level), using the shelf as a stimulus and the opportunity conduct category management and purchase decision studies via personal or video observation. Better quality learning makes for better quality management decisions.
(See advertisement on p. 107)

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600 First Ave. N.
St. Petersburg, FL 33701
Ph. 727-866-2400
Fax 727-867-4129
E-mail: postmaster@srgtampa.com
www.srgtampa.com
Scott Tober

Strategic Edge, Inc.
2000 S. Dairy Ashford St., Ste. 500
Houston, TX 77077-5700
Ph. 281-556-8282
Fax 281-556-8585
E-mail: dsharma@strtedge.com
Deepak M. Sharma, President

Strategic Marketing Solutions
P.O. Box 25938
Colorado Springs, CO 80936
Ph. 719-594-6428
Fax 719-262-0383
E-mail: lizahaight@aol.com
Louisa Young-Borgen

Superior DataWorks, LLC
358 New Byhalia Rd., Ste. 2
Collierville, TN 38017
Ph. 901-861-6301
Fax 901-861-6302
E-mail: svega@SuperiorDataWorks.com
www.SuperiorDataWorks.com
Sharon Vega, Chief Manager

Survey Service, Inc.
1911 Sheridan Dr.
Buffalo, NY 14223
Ph. 716-876-6450
Fax 716-876-0430
E-mail: sservice@surveyservice.com
www.surveyservice.com
Susan R. Adelman, President

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1300 Wilson Blvd., Ste. 950
Arlington, VA 22209
Ph. 703-524-1456
Fax 703-524-6374
www.tarp.com

Taylor Nelson Sofres Intersearch
(Formerly SOFRES Intersearch)
410 Horsham Rd.
Horsham, PA 19044-0189
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E-mail: bruce.shandler@intersearch.tnsofres.com
www.intersearch.tnsofres.com
Bruce Shandler, CEO/President

Gene Taylor & Associates
11355 Warner Ave.
Fountain Valley, CA 92708
Ph. 714-775-1900
Fax 714-775-9030
E-mail: gtaintl@aol.com
Gene Taylor, President

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194 Andover Rd.
Sparta, NJ 07871
Ph. 973-726-8700
Fax 973-726-8787
www.usadirectinc.com
Guy Parker, President

The Wagner Group, Inc.
53 W. 21st St.
New York, NY 10010
Ph. 212-627-0066
Fax 212-727-7492
E-mail: wagner4@mail.idt.net
Jeffrey Wagner, President

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3939 Priority Way South Dr.
Indianapolis, IN 46240
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E-mail: info@walkerinfo.com
www.walkerinfo.com
Connie Burking, Director

Widener-Burrows & Associates
2191 Defense Hwy.
Crofton, MD 21114
Ph. 410-721-0500
E-mail: WBANDA@aol.com
Steve Markenson, President

Winona Research
8040 Old Cedar Ave. S.
Minneapolis, MN 55425-1211
Ph. 612-881-5400
Fax 612-853-9510
E-mail: wrgroup@winonaresearch.com
www.winonaresearch.com
Bill Etter, Ph.D., Dir. of Cust. Loyalty/Equity

Yarnell, Inc.
110 Sutter St., Ste. 811
San Francisco, CA 94104
Ph. 415-434-6622
Fax 415-434-0475
E-mail: SYarnell@Yarnell-Research.com
Steven M. Yarnell, Ph.D., President

In-store studies grow in importance

In the retail environment shoppers don't have to "remember," they're already there. The store shelf and shopping experience can be part of the stimulus.

By William J. Hruby

Editor's note: William Hruby is a market research and advertising consultant with nearly two decades of packaged goods marketing experience.

A quandary exists for packaged goods marketers: Consumers often think about crucial product or marketing issues only while they stand at the shelf. Yet research is most commonly conducted in malls, mail panels and other locations far removed from the point-of-sale. The fact that 100% of all buying decisions are ultimately made at the shelf favors the case for in-store research.

Go where the shoppers decide to buy. To capture those fleeting points which translate into product A being selected over product B, consumers must be intercepted in the store where top-of-mind issues are present. Meet that same consumer in a mall two weeks later, and, **IF** you can get them to speak with you at all, it is highly unlikely they can remember their purchase decisions, awareness of brand options, motivations for purchase, etc. And certainly not with the same degree of accuracy as an interview conducted at the point-of-purchase.

Participation is a major and growing problem for traditional research methods. Mall wave-off rates (shoppers who refuse to even be approached) hover around 90%, compared to in-store wave-offs which are more typically 30-50%.

In a recent issue of *Marketing Research* (Spring, 1998), authors Bearden, Madden and Uscategui summarized this point. In their report they emphasize that the pool of qualified respondents is drying up. Their concern: "Lack of representativeness resulting from refusals to participate . . . jeopardizes the accuracy of survey results. Evidence suggests that the *decline in participation rates is already occurring and may accelerate.*"

Three questions you should ask: Prior to going to field, cutting edge market researchers ask themselves three questions, according to Dr. Herb Sorensen of Sorensen Associates

1) What information is needed?

2) Who has that information?

3) Where are they; and are most capable of providing the information?

For packaged goods researchers involved in concept, prototype and related phases of product development who rely on Product Guidance Research, the answers often point to in-store research.

Sorensen Associates has available over 40,000 retail locations in the U.S., and the technology to execute fieldwork in a few days. This infrastructure is at the foundation of the firm's reputation for conducting demographically structured studies at the neighborhood level.

Researchers now have new and better options for collecting consumer information - *at the point of purchase.* ■

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Ph. 818-226-1333 • Fax 818-226-1338

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Focus Central 48
Ph. 212-989-2760 • Fax 212-647-7659

Focus Groups of Cleveland Survey Center . . .64
Ph. 216-642-8883 • Fax 216-901-8085

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Ph. 610-667-1110 • Fax 610-667-4858

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NCS 101
Ph. 800-447-3269 • Fax 612-830-8564

NETWORK 61
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Nordhaus Research, Inc. 103
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Opinion Search, Inc. 5
Ph. 800-363-4229 • Fax 613-230-3793

PhoneLab Research, Inc. 17
Ph. 800-220-5089 • Fax 215-561-7403

Pine Company 67
Ph. 800-969-PINE • Fax 310-453-3969

Polaris Marketing Research 102
Ph. 888-816-8700 • Fax 404-816-0352

Polk Research Sampling 19
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Precision Research, Inc. 60, 72
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Ph. 615-292-4860 • Fax 615-292-0262

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Pulse Train Technology 15
Ph. 561-842-4000 • Fax 561-842-7280

Q-Set, Inc. 55
Ph. 605-256-4338 • Fax 605-256-6679

Quality Controlled Services 33
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Sigma Validation 47
Ph. 201-886-0550 • Fax 201-886-1413

Sorensen Associates, Inc. 106
Ph. 800-542-4321 • Fax 503-666-5113

Star Data Systems, Inc. 10
Ph. 773-794-0400 • Fax 773-794-0732

Survey Sampling, Inc. 12, 54, 71
Ph. 203-255-4200 • Fax 203-254-0372

1998-99 SourceBook Listing Additions and Corrections

Please add the following firm to the 1998-99 Researcher SourceBook:

Analytique
Burningfold Hall
Chapel Hill
Dunsfold, Surrey GU8 4NZ
UK
Ph. 44-1483-200-750
Fax 44-1483-200-950
E-mail: jacqueline.arsivaud@analytique.com
Jacqueline Arsivaud

Please note the following corrections to the 1998-99 Researcher SourceBook:

On page 74, under the listing for Pine Company, the e-mail address should read pineco@pineda-ta.com. The fax number should read 310-815-5799.

On page 82, the firm listed as "Analtique" should be listed as Analytique. In addition, the company's e-mail address should be info@analytique.com. Its Web address is www.analytique.com.

On page 111, the phone and fax numbers for Gemma C. Baker Research should read 860-653-5241.

On page 161, due to a printing error, the listing information for C R Market Surveys did not appear above the firm's descriptive write-up and logo. Here is the full listing and write-up:

C R Market Surveys
9510 S. Constance, Ste. C-6
Universal City Professional Bldg.
Chicago, IL 60617-4734
Ph. 800-882-1983 or 773-933-0548
Fax 773-233-0484
E-mail: CRMS1@aol.com
www.crmarket.com
Cherlyn Robinson, Project Coordinator

C R Market Surveys is a full-service marketing research firm specializing in ethnic (African-American, Hispanic, Asian, Polish) and general market research. We offer both quantitative (on-site interviews, telephone, mystery shops, taste tests, product testing, in-store audits) and qualitative (pre-recruits, ethnic moderators, one-on-one interviews) research services. Our facility comes equipped with a focus group facility, test kitchen, and a telephone center. We are conveniently located just five minutes off the expressway, and free parking is available.

On page 295, under the listings for Cleveland Survey Center and Focus Groups of Cleveland Survey Center, change Betty Perry's title to president and add Amy A. Morris, executive director, as an additional contact person.

On page 324, due to a printing error, the display ad for Prince Market Research appeared to contain a misspelled word. The line "trategy/Competitive Research" should read "Strategy/Competitive Research."

Due to a printing error, the following categories were not included at the end of the Industries and Markets Cross-Index which concluded on page 486.

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Classified Ads

Listing Additions

Please note the following correction to the 1998 Omnibus Research Directory:

Los Angeles-based CENTRIS should be listed under the following cross-index categories: Cable, Computers, Consumer-U.S., Entertainment, Gaming, Internet, Media, Technology, Telecommunications, Videos.

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ing first at how the organization is structured, to get a better idea of its internal processes and thereby gauge their effect on customer satisfaction. Next he suggests looking at processes, using graphing techniques (radar charts, etc.), run charts, stratification and flow charts. Then it's on to people, looking at complaints, examining why customers don't complain and various theories on estimating the number of complaints. Under "detailing," he looks at benchmarking, control charts, laddering, factor analysis, etc.

The book seems ideally suited for managers at companies that are considering starting or expanding a quality or satisfaction measurement program. Chapter 20, "A Step-by-Step Guide to Measuring Customer Satisfaction," gives a solid overview of some of the established theories about quality and satisfaction and the ways to measure them.

For those of you who need the printed word to convince higher-ups that focusing on the customer is a good thing, Chakrapani supplies valuable insights and suggestions. For example, how do you construct a good complaint elicitation system? Chakrapani says it should be proactive (customers should be encouraged to let the company know they are dissatisfied); it should be uncomplicated ("Obviously, it is not a good idea to further inconvenience an already dissatisfied customer; yet this is what most organizations end up doing."); it should provide a quick response; and it should have management commitment and employee training.

One area that doesn't get talked about much in cust sat literature is complaint analysis. Chakrapani briefly discusses three methods: belief system analysis, Pareto charts, and content analysis and tracking.

And he makes a strong case for researching a company's processes, in addition to its frontline employees, as part of a satisfaction measurement effort. Friendly, helpful salespeople are obviously important, but if they are handcuffed in their efforts to provide good service or resolve customer complaints by inefficient or byzantine corporate regulations, even the most cheerful and accommodating staff is useless.

How to Measure Service Quality & Customer Satisfaction - The Informal Field Guide for Tools and Techniques *is published by the American Marketing Association, 250 S. Wacker Dr., Suite 200, Chicago, Ill., 60606.*

U.S. POSTAL SERVICE Required by 39 U.S.C 3685 STATEMENT OF OWNERSHIP, MANAGEMENT AND CIRCULATION 1 *Title of Publication:* Quirk's Marketing Research Review. **2.** *Publication No.:* 0893-7451. **3.** *Date of Filing:* Sept. 19, 1997 **4.** *Frequency of Issue:* Jan., Feb., Mar., Apr., May, June, July, Aug/Sept., Oct., Nov., Dec. **5.** *No. of Issues Published Annually:* 11. **6.** *Annual Subscription Price:* None and $70.00. **7.** *Complete Mailing Address of Known Office of Publication:* 8030 Cedar Ave. So., Ste.229, Bloomington MN 55425-1215. *Contact:* Quentin Quirk.*Telephone:* 612-854-5101. **8.** *Complete Mailing Address of the Headquarters of General Business Offices of the Publisher:* 8030 Cedar Ave. So., Ste. 229, Bloomington, MN 55425-1215. **9.** *Full Names and Complete Mailing Address of Publisher, Editor, and Managing Editor. Publisher:* Quentin T. Quirk, 8030 Cedar Ave. So., Ste. 229, Bloomington, MN 55425-1215; *Editor:* Joseph Rydholm, 8030 Cedar Ave. So., Ste. 229, Bloomington, MN 55425-1215. *Managing Editor:* Not Applicable; **10.** *Owner:* Quirk Enterprises, Inc., 8030 Cedar Ave. So., Ste. 229, Bloomington, MN 55425-1215; *Stockholders:* Quentin T. Quirk, 8030 Cedar Ave. So.,Ste. 229, Bloomington, MN 55425-1215, John P. Quirk, 550 42nd St. SW, Montrose, MN 55363, James T. Quirk, 8030 Cedar Ave. So.,Ste. 229, Bloomington, MN 55425-1215, Daniel M. Quirk, 8030 Cedar Ave. So.,Ste. 229, Bloomington, MN 55425-1215, Stephen R. Quirk, 8030 Cedar Ave. So.,Ste. 229, Bloomington, MN 55425-1215, Ann M. Quirk, 9400 Sheridan Ave. So., Bloomington, MN 55431, Teresa K. Tweed, 16932 Hubbard Trail, Lakeville, MN 55044 **11.** *Known Bondholders, Mortgagees, and Other Security-Holders Owning 1 Percent or More of Total Amount of Bonds, Mortgages or Other Securities:* None. **12.** *For Completion by Nonprofit Organizations Authorized to Mail at Special Rates:* Not Applicable. **13.** *Publication Name:* Quirk's Marketing Research Review **14.** *Issue Date for Circulation Data Below:* August/September 1998. **15.** *Extent and Nature of Circulation: Average No. Copies Each Issue During Preceding 12 Months:* **A.** *Total No. Copies (Net Press Run):* 16,245. **B1.** *Paid or Requested Circulation: Sales (Through Dealers and Carriers, Street Vendors and Counter Sales):* None. **B2.** *Paid and/or Requested Mail Subscriptions Include advertisers' Proof Copies/Exchange Copies:* 9,463. **C.** *Total Paid and/or Requested Circulation:* 9,463. **D.** *Free Distribution by Mail, Carrier or Other Means Samples, Complimentary and Other Free Copies:* 6,173. **E.** *Free Distribution Outside the Mail (Carriers or Other Means):* None. **F.** *Total Free Distribution: 6,173* **G.** *Total Distribution:* 15,636. **H1.** *Copies Not Distributed (Office Use/Leftovers, Spoiled):* 609. **H2.** *Return From News Agents:* None **I.** *Total:* 16,245. *Percent Paid and/or Requested Circulation:* 60.5% *Actual No. Copies of Single Issue Published Nearest to Filing Date.* **A.**16,600; **B1.**None; **B2.**9,603; **C.**9,603; **D.**6,345; **E.**None; **F** 6,345; **G.**15,948; **H1.**652; **H2.**None; **I.**16,600; *Percent Paid and/or Requested Circulation:* 60.2%. *I certify that the statements made by me above are correct and complete:* Quentin T. Quirk, Publisher.

Trade Talk

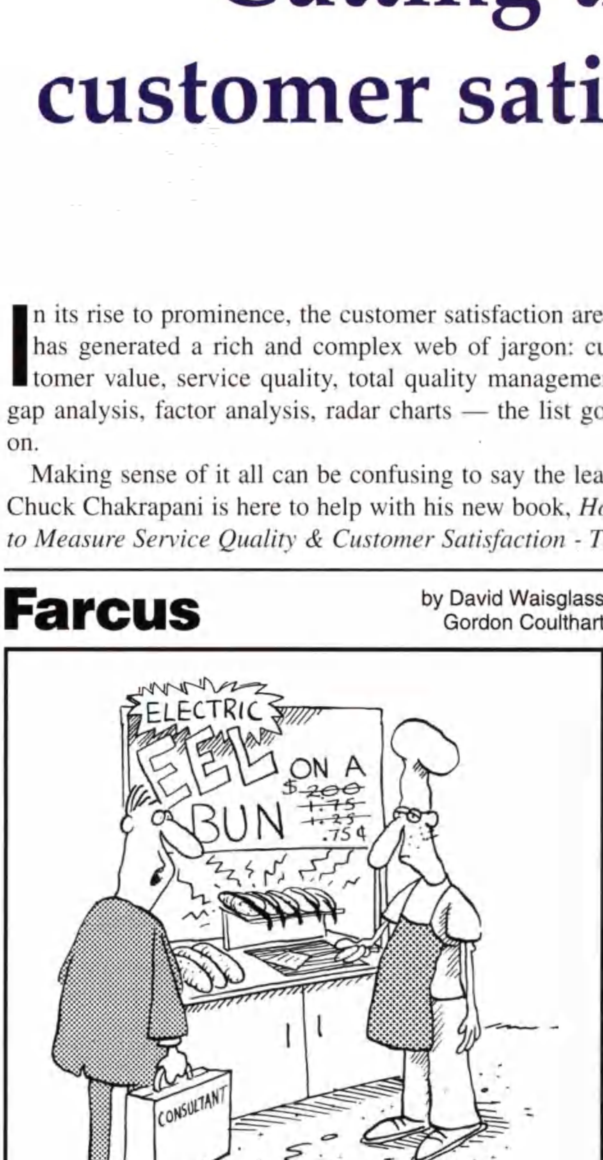
By Joseph Rydholm/QMRR editor

Cutting through the customer satisfaction jargon

In its rise to prominence, the customer satisfaction arena has generated a rich and complex web of jargon: customer value, service quality, total quality management, gap analysis, factor analysis, radar charts — the list goes on.

Making sense of it all can be confusing to say the least. Chuck Chakrapani is here to help with his new book, *How to Measure Service Quality & Customer Satisfaction - The Informal Field Guide for Tools and Techniques*. Chakrapani, president of Standard Research Systems in Toronto, has written a number of research-related books and articles and is currently editor-in-chief of the *Canadian Journal of Marketing Research.*

Farcus by David Waisglass Gordon Coulthart



"I'm not sure, but I think it's a marketing problem."

Obviously a man with a lot of real-world research experience, he states in the preface that the book was written to "...provide immediate help to the harried manager and researcher, or the academic, who must find a suitable technique for a given problem and understand what it does and how. In a hurry. On a late Friday afternoon."

To that end, he succeeds admirably. In the course of taking the reader on a trek through the many steps of a quality/satisfaction measurement program, the book gives quick-hit examples and explanations of a host of techniques and terms. You won't find in-depth discussions here; rather, Chakrapani gives the reader a basic understanding and in most cases provides a list of books containing more information on a specific topic. Also helpful is a quick-reference list that matches service-related questions (e.g., How do customers see us?) with suggested analysis techniques and the corresponding chapter in which Chakrapani explains them.

The core of the book explores what he calls the P3D3 matrix, which is made up of the three P's of measuring service quality (producers, processes and people) and the three D's (diagnosing, detailing and delivering). From chapter 10 to 19, Chakrapani focuses on one matrix cell at a time, and the methods used to measure and evaluate them.

For example, under the "diagnosing" section, to those setting up a service quality initiative, he recommends look-

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