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Marketing Research Review

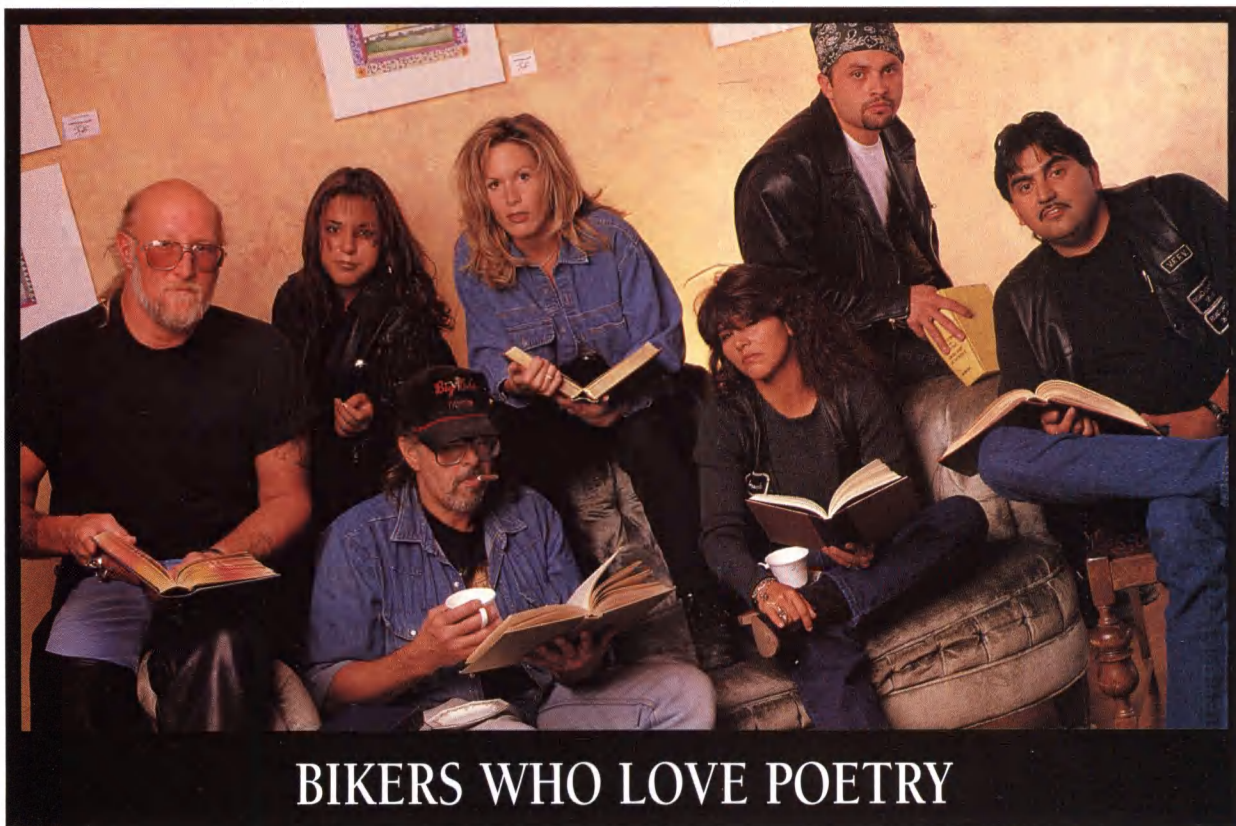
Volume XIII, Number 1

January 1999

Are quality and timeliness competing priorities?

- **Mystery shopping drives Sonic's incentive program**
- **Identifying 'voice of the customer' disconnects**
- **Becoming a service leader**

Mystery Shopping Directory



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QUIRK'S

Marketing Research Review

Volume XIII, Number 1

January 1999

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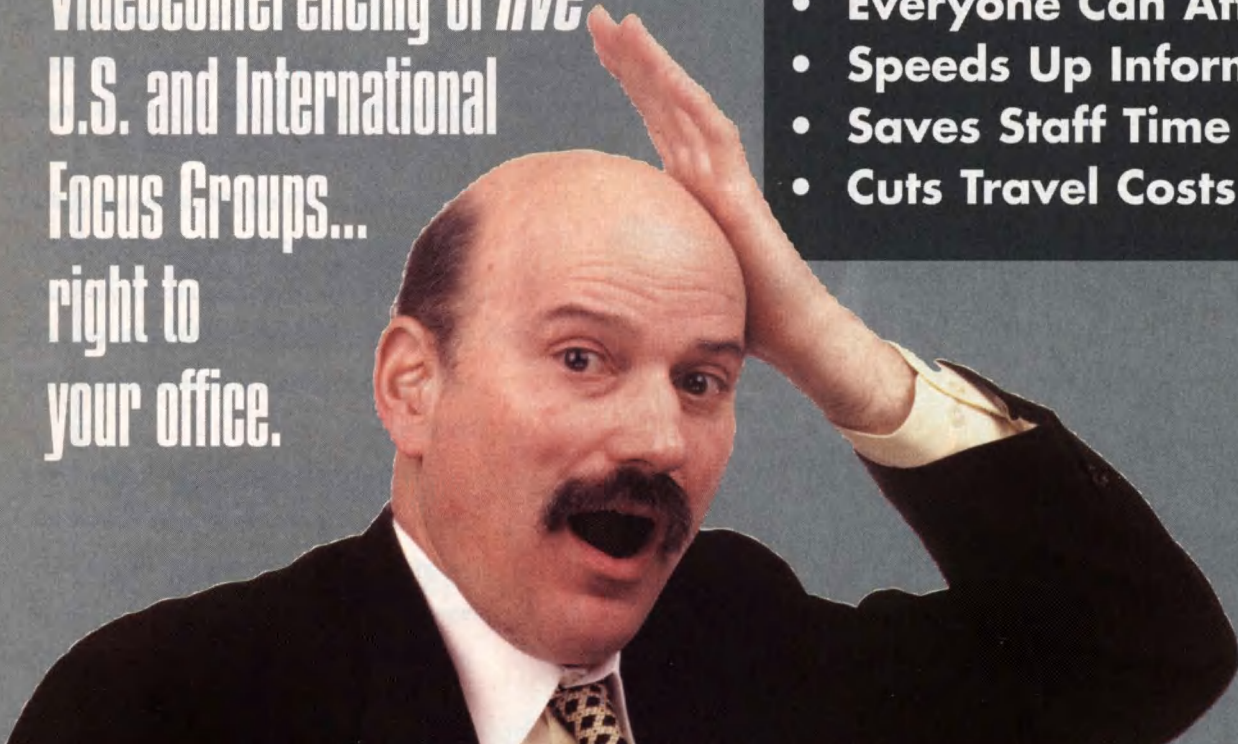


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America gets a D-plus in history

Think most Americans know how many stars are on the American flag? Think again. As a whole, Americans scored a dismal 68 percent on a five-question quiz on American history — that's a D+ in most grade books. A Maritz AmeriPoll telephone survey



(conducted by St. Louis-based Maritz Marketing Research) put 1,004 randomly selected Americans to the following

test:

1. How many stars are on the American flag? 2. How many stripes are on the American flag? 3. What is the name of our national anthem? 4. What year was the Declaration of Independence signed? 5. Who was the first president of the United States?

Breaking down total responses by question, results were as follows:

1. There's one for each state in the union, but just 70 percent of Americans know there are 50 stars on our flag, while another 10 percent guessed 52. There was a significant gender gap here, with 76 percent of men answering correctly compared to 65 percent of women.

2. About 60 percent of Americans correctly answered 13 when asked how many stripes are on the American flag (one for each of the original colonies). Again, there was a significant gender difference, with 63 percent of men answering correctly compared to 55 percent of women. Less than half (49 percent) of Americans age 25-34 knew the right answer, many of them giving a number higher than 13. However, 18-24-

year-olds and 45-54-year-olds did the best, with 64 percent in each group answering correctly.

3. Just under two-thirds (62 percent) of people knew that the name of our national anthem is "The Star-Spangled Banner" — meaning there's nearly 76 million Americans

who can't name that tune (when figures are projected to the U.S. population over age 18). Percentages of correct responses generally decreased with age (that is, the younger you are, the more likely you are to know

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Home office growth holds steady

The combination of many growing trends — such as PCs, Internet, downsizing, early retirement, and entrepreneurialism — has led to the widespread adoption of the home office. According to research conducted by CDB Research & Consulting Inc., New York, one in five American households uses a home office, a proportion which has been stable for over a year. The survey results indicate that those using a home office are more likely to be well-educated and male, but cut across age and income lines, and even employment status.

While it is not too surprising that people over 55 are the least likely to have a home office (15 percent), and Baby Boomers are the most likely (28 percent), it is interesting to note that nearly one out of four Gen-Xers, aged 21 to 34, also has a home office. Moreover, middle-income Americans (between \$45,000 and \$75,000 of annual income) are about as likely as their more affluent neighbors (\$75,000 income or more) to have a home office (29 percent and 33 percent, respectively).



"The availability of technology is really what's enabling the growth of home offices," says Larry Chiagouris, managing director of CDB Research

& Consulting Inc. "Consumers can now afford to purchase most of the equipment they need to conduct business. In addition, the Internet gives these individuals access to resources traditionally available only to large corporations, making it much easier to conduct business from the home."

While it makes sense that about two out of three self-employed people have home offices, those who are employed by someone else are nearly as likely as the average to have such a facility (17 percent), which reflects changing work patterns prompted by downsizing and the consequent increased work loads. Surprisingly, 11 percent of those who are not employed — mainly retired people and students — also have a home office of some kind.

"Many people who are accepting early retirement packages are too young to putter around the garden for the next 20 years, so they start small businesses that are run out of their home offices," says Chiagouris. "In addition, many students are facile with technology and the Internet, which makes it very easy for them to operate small businesses from home, as well," he says. For more information call 212-367-6858.

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New home office panel

U.K.-based IRB Research has launched its SoHo Panel, a dedicated research panel of small office/home office business decision makers. Derived from responses to IRB's SoHo Monitor, these individuals have all agreed to be part of the panel. For more information call Darren Noyce at 44-181-505-9211 or visit the company's Web site at www.irb-international.co.uk.

SPSS 9.0 now available

SPSS has introduced SPSS 9.0 for Windows, including enhanced graphical analysis capabilities, new statistics and new data access tools which combine to simplify the acquisition and analysis of large amounts of data. Topping the list of new features is a table-to-graph function that allows users to see a picture of their tabular data in a few mouse clicks. Instead of sifting through mountains of numbers to find important factors and relationships, analysts can switch over to a graph of their data for a visual representation of the information, from basic reports or advanced analytic techniques, without having to rerun the analysis.

The addition of an ASCII Text Wizard to the software's set of acquisition tools gives users the ability to map ASCII data from wherever it resides. By joining SPSS 9.0 with the SmartViewer Web Server, organizations can have a comprehensive Report OLAP system not only for acquiring and analyzing data but also for distributing and consuming information. For more information call 800-543-5815 or visit the company's Web site at www.spss.com.

Guide outlines ad claim support procedures

A new guide that strives to establish what are permissible and recommended procedures for supporting advertising claims has been published by the American Society for Testing and Materials (ASTM). Known as E 1958, the guide was developed by ASTM's

Committee E-18 on Sensory Evaluation of Materials and Products. For eight years, sensory scientists, psychologists, statisticians and attorneys worked together to produce this document. They represented the points of view of advertisers, suppliers, and practitioners in the fields of product development and consumer testing for claim support. The guide provides guidance on what testing to do based on the kind of claim that is being substantiated, including which products to test against, how many to test against, and where to test in the market. The 20-page document also covers attribute, performance, and hedonic claims, both comparative and non-comparative. It also includes broad principles covering the selection and recruiting of representative consumer samples, selecting and preparing products, constructing product rating forms, executing tests, and handling statistical data. The committee is careful to note that E 1958 is by no means intended to be prescriptive. It is, instead, intended to aid judgment. For a copy of E 1958, contact ASTM Customer Service at 610-832-9585, at service@astm.org or visit the organization's Web site at www.astm.org.

X.OCX version of TrendMap from Spatial Insights

Spatial Insights, Inc., Vienna, Va., has released an active X.OCX version of the TrendMap Trade Area Analysis system. TrendMap is used for the mapping of spatial trends from georeferenced point-based data. The system can be used to create accurate trade area maps from customer location or point-of-sale data, map the concentration of competitors, or to evaluate trends in other types of point-based samples, such as geochemical or environmental surveys. The TrendMap OCX is an application developers tool that enables TrendMap functionality to be accessed from and used with customized mapping applications developed with Visual Basic or C pro-

continued on p. 52



SAWTOOTH SOFTWARE CONFERENCE: Sawtooth Software, Inc., Sequim, Wash., will hold its seventh annual conference on February 2-5 at the San Diego Marriott in La Jolla, Calif. The conference will feature tutorials on topics such as market segmentation and Internet research and concurrent sessions on a variety of topics including conjoint on the Web, using scanner data to validate choice model estimates and new ways to examine point-of-purchase dynamics. Speakers have been challenged to emphasize practical rather than commercial activities. Attendance will be limited to 250 participants. For more information call Marilyn Stanford at 360-681-300 or to register on-line, go to www.sawtooth-software.com.

ESOMAR INTERNET CONFERENCE: On February 21-23, the European Society for Opinion and Marketing Research (ESOMAR) will hold Net Effects, a worldwide Internet conference and exhibition, at the London Hilton on Park Lane. For more information visit the ESOMAR Web site at www.esomar.nl.

SENSORY EVALUATION WORKSHOP: As part of its workshop series "Issues in Sensory Evaluation," Tragon Corporation will hold a workshop entitled Principles of Sensory Evaluation on March 1-3 at the Sheraton Palo Alto, Palo Alto, Calif. The workshop will focus on screening and selection of subjects, description of test procedures, consumer testing guidelines, optimization techniques, and statistical analysis and interpretation of results. For more information call 650-365-1833 or visit the company's Web site at www.tragon.com.

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.* ■



Purchase-intention surveys can take you only so far; marketers would also do well to observe consumers in real buying situations.

Harvard Business Review
May-June 1998



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Names of Note

Haydn Evans has been appointed manager of the new West Long Branch, N.J., interviewing and operations facility of *Schulman, Ronca & Bucuvalas, Inc.*, New York.

Burke, Inc., Cincinnati, has promoted **Betty Fraley** to senior vice presi-



Fraley

Miller

dent, research services, and **Jeff Miller** to senior vice president, consulting and analytical services.

Rockwood Research Corp., St. Paul, has named **Linda LaGarce** account executive and **William Kattner** vice president sales.

Clearwater Research, Boise, Idaho, has promoted **Pam Hanson** and **Stephanie Miller** to data collection assistant supervisor. In addition, **Ward Ballard** has been named research technical assistant. At the firm's Council, Idaho, office, **Kelly Hemenway** has been promoted to data collection supervisor and **Diane Coon** has been promoted to data collection assistant supervisor.

The Atlanta office of Cincinnati-based *Burke Strategic Consulting Group*, a division of *Burke, Inc.*, has promoted **Bill Newbolt** to research manager. The firm has also added **Brent Churchwell**, **JoAnn**

Sciarrino, **Heather Pierce**, and **Lisa Steelman** as research consultants. In addition, **Kathleen Wilsack** has joined the firm's Newton, Mass., office as research consultant.

Paul Lubin has been named presi-



Wilsack

Lubin

dent of *Barry Leeds & Associates*, New York. **Barry Leeds** has been named chairman.

Miami-based *Strategy Research Corp.* has named **Evan Oster** vice president. In addition, **Gloria Gomez Cantens** has been named qualitative research project director; **Mario Gonzalez** has been named director of field operations; and **Jose Loureiro**



Cardoso

Oster

Cardoso has been named qualitative research project director in the firm's Sao Paulo, Brazil, office.

David Rockland will head the new Washington, D.C., office of New York-based *Roper Starch Worldwide*, serving as senior vice president and managing director.

Ellen Burg has joined *Taylor Nelson Sofres Intersearch*, Horsham, Pa., as executive vice president.

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Gordon Black and **David Clemm** of *Harris Black International* have been named Executives of the Year for 1998 by *Research Business Report*. The award is presented to the person or persons who make the largest contribution to technological or economic advancement in the marketing research business.

Gian Fulgoni has resigned as chief executive officer of *Information Resources, Inc.*, Chicago. **Thomas Wilson, Jr.** will serve as CEO on an interim basis until a suitable replacement can be found.

Joanne DiNapoli has been promoted to manager of new products and sales staff development at *Survey Sampling, Inc.*, Fairfield, Conn. **Gwen Kaplan**, national accounts manager, will oversee client relationships for clients that were previously managed by DiNapoli. The firm has also added three new account executives: **Debbie Baran**, **Ned Gannon**, and **Lisa Habighorst**.

Robert Mortenson has joined *Knowledge Systems & Research, Inc.*, Syracuse, N.Y., as principal and director of concept development services.



Mortenson

Lucas

Jim Lucas has been named senior vice president and head of the strategic planning and research department of *Frankel*, a Chicago brand marketing agency.

Carlos Salazar-Velasquez has joined CMA Latina, the Hispanic marketing research group of *Conway|Milliken & Associates*, a Chicago research firm.

Jonathan Harding has been named president of *NFO Research*, Northwood, Ohio.

Michael Watkins has joined *Marketing Support, Inc.*, a Chicago marketing agency, as an account supervisor.

Directions Research, Inc., Cincinnati, Ohio, has named **Philip**



Brantley

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Edward Johnson has joined the *TeleSession Corp.*, a New York research firm, as director of business development.

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SPSS Inc., Chicago, has acquired Australia-based research software developer **SurveyCraft Pty. Ltd.** Under the terms of the agreement, SPSS purchased the assets of SurveyCraft for approximately \$2 million.

Creative Research Systems, Petaluma, Calif., has expanded its Web site facilities. In addition to the on-line sample size calculator and survey design white paper, the site now includes reprints of the some of the most popular articles from the user newsletter *DataFile*, including articles on statistical significance and an explanation of correlation as a statistical function. Articles may be downloaded without limit provided acknowledgment of the source is made. The site is located at www.surveysystem.com.

Cambridge, Mass.-based **Cytel Software**, makers of StatXact and other statistical software, has won one of the four awards from the Massachusetts Technology Collaborative for "Small Business Innovation Research."

GE Capital's Equity Capital Group has made an \$8 million strategic investment in **Sky Alland**, a customer relationship management firm based in Columbia, Md. Through the purchase of new, preferred stock in Sky Alland, GE Capital's Equity Capital Group joins Safeguard Scientifics, Advanta Partners, Internet Capital Group and Sky Alland employees as key stakeholders in the company.

AB&C Marketing, a McLean, Va., marketing communications agency, has formed an alliance with **AWP Research** of Herndon, Va., to provide comprehensive research services to clients.

Roper Starch Worldwide Inc. and Response Analysis Corp. have completed a previously announced deal to combine their companies. Terms were not disclosed. The new entity will be called Roper Starch Worldwide Inc., with Response Analysis operating as a division under its own name from its offices in Princeton, N.J.

In other news, Roper Starch Worldwide has opened an office in Washington, D.C. David Rockland will head the new office, serving as senior vice president and managing director.

JRA, J. Reckner Associates, Inc., Marketing Research, has been named to the 10th annual Philadelphia 100 list. The Philadelphia 100 is composed of the fastest-growing privately held companies in the region. It is a joint project of the Wharton Small Business Development Center and the *Philadelphia Business Journal*. JRA has also opened its fifth Philadelphia regional office at Oaklands Corporate Center in Exton, Pa. The office includes a focus group facility and a telephone center.

Satisfaction Management Systems, Inc., Minnetonka, Minn., has opened a satellite office in Indianapolis. The new office will be headed by Barry Maners.

ABC, CBS, Fox, and NBC have sponsored AdWorks 2, a comprehensive analysis of the sales responsiveness of television advertising. The announcement was made by **Information Resources, Inc. (IRI)**, Chicago, and Media Marketing Assessment, who formed a collaboration to conduct this research initiative. Adworks 2 examines actual sales and advertising data for hundreds of brands and uses marketing mix models to separate out the incremental sales effect of TV advertising. The study analyzes factors that impact TV ad effectiveness such as consumer demographics and brand buying behavior, elements of the media plan, competitive environment, promotion conditions and brand/category characteristics. More than 1,500 brands in 200+ categories across 50 markets will be included in the analysis. The study uses IRI's InfoScan scanner sales, promotion and price information. Nielsen Media Research's Monitor Plus service is the source for weekly television rating



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information. IRI and MMA will jointly analyze the results.

NFO Worldwide, Greenwich, Conn., has awarded the licenses for its proprietary MarketMind system to its affiliate companies, the MBL Group in the Mid and Far East and BJM Research in the U.K.

Knowledge Systems and Research, Inc., Syracuse, N.Y., has formed an alliance with Arthur Andersen's Communications, Media, and Entertainment Group as part of a three-way alliance initiated by Arthur Andersen. KS&R will support the alliance in the areas of primary and secondary customer research, competitive assessment, and market position analysis.

McLauchlan & Associates, Inc., a Cincinnati, Ohio, research firm, has won the 1998 Pinnacle Award for fastest growing women-owned business in Cincinnati. The Pinnacle Awards were designed and sponsored by the *Cincinnati Business Courier*, Deloitte & Touche LLP, and Northwestern Mutual Life to recognize Cincinnati's fastest growing businesses.

Arbitron NewMedia will work with **Magnitude Network** and **Engage Technologies** to develop its audience measurement services for broadcasters and other content providers who use the Internet for the delivery of streaming media, including live audio and video content. The services will provide radio stations, other Internet broadcasters, advertisers and ad agencies with third-party measures that will facilitate the buying and selling of on-line and integrated Webcast/broadcast advertising packages.

By the end of October, all member states in the European Union (EU) were supposed to enact the Directive on Data Protection. Introduced to protect EU citizens from possible misuse of their personal data, the Directive is based on the general principles that personal data should be used only for the stated purpose for which it is collected, that citizens have the opportu-

nity to change or delete data which is incorrect and that they should be asked for their permission if their data is to be handed to a third party. It was expected that the Directive would not adversely affect social and marketing research. However, **ESOMAR** (the European Society for Opinion and Marketing Research) is concerned that in the process of translating the Directive into national legislation, the authorities might inadvertently introduce restrictions that could either make research impossible to carry out, or compromise the scientific nature of the sampling techniques used in social, opinion and marketing research. The voluntary cooperation of respondents and the guarantee that their personal data won't be passed on in a form which allows them to be identified without their informed consent are basic principles on which survey research itself depends and are central to the ICC/ESOMAR International Code to which all members of ESOMAR and of national associations in more than 50 countries abide. A 1996 Eurobarometer survey conducted in

each of the 15 EU member states showed that the public view of research is positive.

- 85 percent of the public surveyed felt that interviewing allows decision-makers to take people's views into account, that it is the proper scientific way of getting opinions and that surveys help to develop better products and services.

- 90 percent felt that individuals should be able to decide for themselves whether or not they are willing to allow personal information to be passed onto someone else.

- 47 percent of respondents said they trust market and opinion research companies regarding the proper use of information (compared to 48 percent for national authorities and 17 percent for mail-order companies).

- Almost 60 percent had no reservations about being interviewed and 30 percent said it would depend on the specific circumstances. Only a very small minority is consistently unwilling to be interviewed under any circumstances.

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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.

Sharyn Kail of Elrick & Lavidge tells about a CATI programmer who works for a supplier out of her home. She was heavily involved in a problematic study which was going through numerous revisions, constantly necessitating changes to the CATI program. Since the programmer's point of contact was the project manager, she never knew the actual name of the client dictating the changes.

When the dust settled, the client wanted to show his appreciation for the hard work the programmer had put forth, so he sent flowers to the programmer's home. Enclosed was a note which said, "Thanks for the wild ride." The programmer did not recognize the name of the man who had sent the flowers, and had a really tough time of explaining the meaning of the note to her jealous husband.

At the end of October I was briefing a study at a telephone bank which was conducting a number of studies in addition to mine. Late in the afternoon, all work was temporarily interrupted while the company took an hour for a Halloween party. Everybody except me was in costume.

While waiting on line for Halloween cake, the fellow in front of me wondered aloud how his respondents would feel if they knew the per-

son conducting the interview, a survey for a blood bank, was dressed as a vampire.

A client of mine would always complain that my price was too high when I provided an estimate, and tried to talk me down. No matter what my price was, over a number of projects, he always wanted me to lower it. Most of the time I stuck by my price, but I was concerned about maintaining goodwill with the client. So, I decided on the tack of adding 10 percent to the cost estimates I provided him, then being more than willing to lower them when he requested I do so.

But after a while, my client no longer challenged my costs. One day he mentioned this, saying that he came around to realizing my costs were fair. But now he's used to paying the higher amounts.

I hope he doesn't read this column and recognize himself (or is it herself?). I'm not revealing his or her name.

Sue Gartzman of Explorations will confirm that market research can sometimes drive you buggy. She tells about conducting a focus group where a ladybug was on the table next to her name tag. Pretty benign, she figured, so she brushed it away.

The respondents came in and got settled. During introductions, she noticed another ladybug crawling on the table. She brushed it and it flew away. Then one landed on a respondent, who brushed it away.

When introductions were finished and the discussion began, Gartzman saw another bug fly in the air. She looked up, and the light fixtures were

swarming with ladybugs. By now she was completely distracted and feeling really creepy-crawly, and her respondents were feeling a little strange too!

Fortunately, after stepping out in somewhat of a panic and alerting the facility operator to the situation, her group and a back room full of viewers were able to move to another room. She'd thought it was going to be the first time she canceled a group due to ladybugs!

Ken Altschul of Wolf/Altschul/Callahan relates an experience when he was moderating a group on print advertising executions. In the middle of the session a woman in some distress got up and started walking to the door. Just before she got there, despite crossing her legs, she couldn't hold it in anymore and, unfortunately, began to urinate.

Even more unfortunately, as she did this, she somehow had managed to be standing atop the advertising to be studied.

The creative director, seated in the backroom, exclaimed, "I've had people comment on my work, but this is ridiculous."

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. (4)

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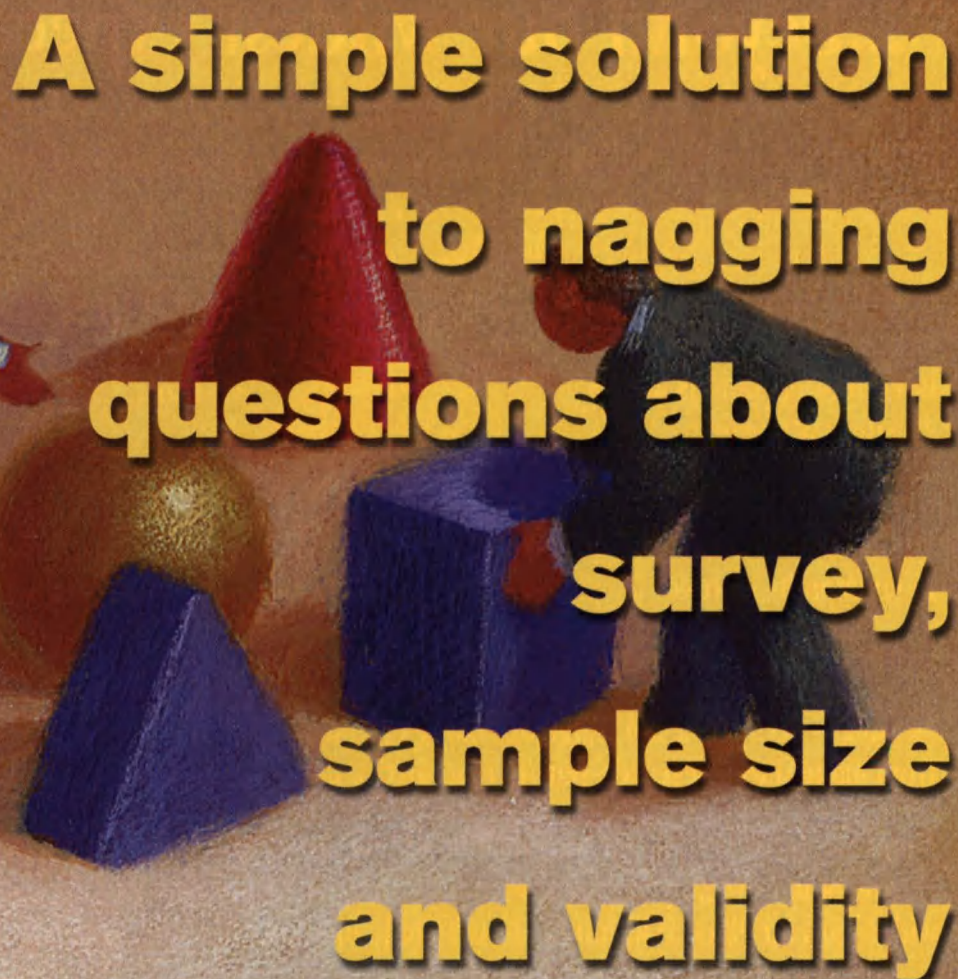
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A child in a blue dress is playing with colorful blocks and a ball. The child is standing on the left, holding a blue box. In the center, there is a large red cone, a yellow ball, and a blue pyramid. On the right, there is a blue cube and a black figure. The background is a textured, light brown color.

A simple solution to nagging questions about survey, sample size and validity

By Susie Sangren

Editor's note: Susie Sangren, president of Clearview Data Strategy, Inc., Ithaca, N.Y., is a consulting statistician. She can be reached at 607-256-3297 or at ss@clearviewdata.com.

You wouldn't believe how many times I have been asked, "How big should my sample size be to give a reasonable estimate of the target population?" (My answer is, "It all depends. . .") The questioners are usually research analysts not trained in probability sampling and statistical theory.

The quality of a market analysis is judged by its validity — in other words, how confident are you, as a researcher, about your findings being replicated in the real marketplace? Data collected from non-probability, informal sample surveys will not allow you to make conclusions about the population with measurable confidence. Remember that the intent of a survey is never just to describe the particular individuals who happen to be selected into the sample, but to obtain a composite profile of the population.

What I am about to show you is an easy (and nonetheless

robust) method of calculating the sample size you would need for your specific market survey or an experiment. The research design is the simple random sampling, and the sample size calculated is the number of completed surveys required to achieve a certain level of confidence and error rate. The number of "completes" may be a lot lower than that of the surveys you will actually send out, depending on your expectation of the response rate.

The beauty of the simple random sampling is that it is probability-based (therefore representative of the population, because everyone in the population has an equal chance of being selected), and it is simple. You can use a random-number generator to pick any sampling units out of the entire population. Simple random sampling is robust because it can meet the needs of most managers. With probability sampling, you can report the following two quantities to relate the accuracy of your sample estimate to the population parameter:

- Sampling errors: How close is your sample estimate to

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Going for the gold

*Mystery shopping drives employee
incentive program*



One goal of many mystery shopping programs, in addition to monitoring employee interaction with customers, is to reward employees for their contribution to providing superior service.

Troy Evans discovered that fact firsthand. Evans, a 25-year-old worker at the Sonic Drive-in in New Iberia, La., won the Gold Medal Station Championship in the annual Dr Pepper Sonic Games for his work in the Swamp (a.k.a. the fry station where onion rings and French fries are prepared).

Garnering this honor was no easy feat and mystery shopping played a direct role in his achievement. Last year nearly 1,200 drive-ins from across the country competed for a place in the Games, an incentive sponsored by Sonic Industries, Dr Pepper and the drive-ins themselves.

Founded in 1958, Sonic operates more than 1,800 drive-in restaurants in 27 states. The company is the fifth largest hamburger chain in the U.S. and is known for its nostalgic eat-in-your-car burgers, coneys, fries and shakes. Food is delivered by carhops, some even on roller skates, or customers can walk up and place an order.

Internal competition

The first step toward winning is an internal competition where crew members compete to become station champions. Then, mystery shopping kicks in. Scores, which rate each drive-in on service, cleanliness, quality and concept integrity, are tabulated nationwide. Last year 12 drive-ins were selected and crew members flown in, all expenses paid, to Anaheim, Calif., where they competed for national recognition in the Games.

Evans and the other contestants were evaluated by a panel of 18 judges over a three-day period on service, quality, accuracy and speed. Evans received his

gold medal on stage at Sonic's national convention in San Diego from Clifford Hudson, Sonic president and CEO, along with Ken Keymer, Sonic's executive vice president and COO. The annual meeting is attended by approximately 2,100 managers, franchisees and supervisors representing drive-ins across the country.

Win/win

The Sonic Games were the brainchild of Sonic's advertising agency, and began in 1994 with 600 drive-ins participating. "This incentive program has been win/win from the beginning,"

later the manager receives a report explaining what went wrong. Instead, we're taking a positive approach. What is unique about the program is that it motivates front-line employees."

"It's the difference between a carrot and a stick," says Greg Cole, national account manager at Maritz Marketing Research Inc., Virtual Customers Division, based in St. Louis. Sonic selected Maritz as one of the companies that will perform the mystery shopping used to select teams for the 1999 games.

Sonic contracted with Maritz last spring as part of a summer mystery



At Sonic restaurants, burgers, coneys, fries and shakes are delivered by carhops, some even on roller skates, or customers can walk up and place an order.

says Celina Abernathy, service programs manager at Sonic. "Crew members win through motivation and operational development, and customers win through improved service.

"While the mystery shopping concept is successful at keeping employees on their toes, there is often a fear factor at the operational level. Sometimes the perception is that secret shoppers come into an establishment, blind-siding employees and management," says Abernathy. "Then days

shopping program co-sponsored with Coca-Cola. "Maintaining a force of skilled shoppers across the country is key to providing good data for our clients," says Al Goldsmith, vice president and division manager of Maritz's Virtual Customer Research Division. Shopper certification, performance and demographic information are tracked through a nationwide database of more than 34,000 individuals in 500

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The
many
uses
of

mystery shopping

By Karen Gomes Moore

Editor's note: Karen Gomes Moore is an account representative with Customer Perspectives, a Hooksett, N.H., mystery shopping firm. She can be reached at 603-647-1300.

Many businesspeople, when they first hear mystery shopping explained, are intrigued. They quickly recognize the value of the information provided, but they aren't quite sure how to use it.

Mystery shopping programs can be used in several ways. And the more ways it's used, the more valuable the investment.

- **Preparing for the competition.** One of the newest uses is to prepare for outside competition. A long-time client of ours, a mid-sized department store with seven locations in two states, learned that two national chains were locating in or near the same mall as its flagship store. The client asked us to do an intensive, two-month mystery shopping program designed to accomplish two things. The first was to take a snapshot of the state of its employees' customer service skills. The client wanted to make sure that customers were being greeted, helped and thanked. He also wanted to know if the employees' stress levels were being communicated to the customer (it was the December holiday season). This snapshot evaluation was designed to identify strengths and weaknesses which could then be addressed.

- **Monitoring the competition.** Keeping an eye on the competition is another way to use mystery shopping reports. Many of our clients ask us to shop not only their own locations but those of their closest competitors. Using the same evaluation form and the same shopper at each establishment, we can tell our client how the

competition is doing, using the client's own criteria. This has been used quite successfully by banking clients as well as supermarkets and clothing retailers.

- **Recognizing good employees.** Another objective of our department store client was to reward employees for excellent performance, thereby emphasizing that only outstanding customer service would retain the shopper loyalty vital to allowing our client to hold its ground against "the big guys."

This client recognized the value of building employee loyalty (through a recognition of excellence program) in order to foster shopper loyalty. Employees who feel valued and recognized pass on their good feelings to their customers. This particular client wanted his employees to feel part of the "home town team" as they prepared to face major competition from the national retailers. The client knew that some of his employees might be recruited by the competition and he wanted to make sure they knew that he appreciated their efforts on the store's behalf.

- **Recognition programs.** Recognition programs are an increasingly common reason for conducting regular mystery shops. We call it "catching the employee doing something right." When one of our clients told us of his plans to institute an employee recognition program, he said he wanted a way "to put the employee's name up in lights." To institute an effective employee recognition program, you must first decide what it is you want to recognize. Is it the basic customer service amenities, such as

saying "Hello," "Thank you," and "Please come again"? Are you trying to promote a new product or service and want to make sure your employees are mentioning it? Or perhaps you just want to keep employees on their toes with the thought that any shopper might be a mystery shopper. If the employee who gets the best

Recognition programs are an increasingly common reason for conducting regular mystery shops. We call it "catching the employee doing something right."

report from the mystery shopper is recognized in some way, those goals will be accomplished.

Recognition can take the form of cash, gift certificates, a plaque, a trophy, a mention in the company newsletter, a preferred parking space,

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Association creates new standards for mystery shopping industry

By Jen Chamberlain

Editor's note: Jen Chamberlain is marketing director for the Mystery Shopping Providers Association, Glenview, Ill. She can be reached at 847-375-4830.

Though mystery shopping has been used for over 40 years, only recently did the industry band together to form a trade association. Established in October 1998, the Mystery Shopping Providers Association (MSPA) already boasts a member-

ship of more than 85 mystery shopping service providers around the world.

"MSPA fills a void that has existed in the industry for years," says Mark Michelson, MSPA president. "Mystery shopping providers have long needed to unite to standardize industry practices and educate clients, providers and shoppers to enhance our business effectiveness."

Michelson, president and CEO of Michelson & Associates, Atlanta, and Michael Bare, CEO of Bare Associates International of Fairfax, Va., initiated efforts to found MSPA in late 1997. They held a conference in February 1998 for mystery shopping providers to discuss common issues and challenges. The response was overwhelming. "We hosted 120 representatives from over 70 companies. The presence and involvement of these companies at this conference told us that MSPA was indeed the organization many industry professionals were needing for their business," says Bare.

Since then, MSPA has been running at full steam. Due to the hard work of the ad hoc membership committee, and particularly of Gene Jones, president of Market Image of Tallahassee, Fla., the association began with over 85 members. The foundation for the non-profit MSPA was formally established at a meeting in Dallas in October 1998, where the group defined its statement of purpose and primary goals.

Address problems

One of MSPA's initial priorities is to address problems created by misleading advertising. Certain companies and individuals have placed classified ads or posted e-mails enticing would-be mystery shoppers with headlines such as, "Earn Thousands While Shopping." These ads exaggerate potential income for mystery shoppers and are nothing more than solicitations to sell consumers lists of companies that may or may not need mystery shoppers. MSPA is working diligently to defeat such practices. "These advertisers are the bane of our profession," Michelson says. "Advertisers using these tactics have eroded the positive image and benefits of mystery shopping, and make it extremely difficult to recruit quality shoppers."

The association is currently drafting a code of professional ethics and standards for the industry that will encourage fairness and enhance professionalism. "One of the challenges we face is the definition of the various

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Leader's Agenda General Session

Philip Guarascio, *Vice President and General Manager,
North American Operations Marketing and Advertising*

GENERAL MOTORS CORPORATION

Robert B. Levin, *President, Worldwide Marketing*

SONY PICTURES ENTERTAINMENT

Peter Stringham, *Chairman and CEO*

YOUNG & RUBICAM NORTH AMERICA

Greg Blonder, *Entrepreneur in Residence*

AT&T VENTURES

President's Reception

with live auction to Benefit St. Mary's Foundation for Children

Tuesday, March 16

State of the Industry General Session

Employment Trends

Gerald Kanovsky, *CAREER CONSULTING GROUP, INC.*

The ARF Study Among CEOs

A. Dawn Lesh, *A. DAWN LESH INTERNATIONAL*

Emerging Research Trends: A New ARF Study

Robert S. Duboff, *MERCER MANAGEMENT CONSULTING*

Spotlight Issue: Researchers, Respondents, and Privacy

Dr. Alan F. Westin, *Professor Emeritus of Public Law
and Government - COLUMBIA UNIVERSITY and Editor and Publisher -
PRIVACY AND AMERICAN BUSINESS*

Tuesday Luncheon

with Scott Pelley, *Chief White House Correspondent - CBS NEWS*

Optional Ogilvy Awards

Black Tie Dinner at The Supper Club

Wednesday, March 17

Three Concurrent Forums:

1. Online Advertising Effectiveness

Lynn Bolger, *APL DIGITAL*

Rex Briggs, *MB INTERACTIVE*

Caroline Eichman, Ph.D., *IBM CORPORATE INTERNET PROGRAMS*

Dan Coates, *Burke, Inc.*

Tom Buehrer, *E-VALUATIONS RESEARCH*

Catherine Ward, *MICROSOFT INTERNET MEDIA GROUP*

Marianne Foley, *IPSOS-ASI INTERACTIVE*

2. Gambling to Win:

American Consumers in 2010

Gary Wright, *THE PROCTER & GAMBLE COMPANY*

Ryan Matthews - *FIRST MATTER, LLC*

Chris Ertel - *GLOBAL BUSINESS NETWORK*

3. Advertising Effectiveness -

New Answers to Three Critical Questions

William H. Moulton - *IPSOS-ASI, INC.*

Steve Schmidt - *AC NIELSEN U.S.*

David W. Stewart - *UNIVERSITY OF SOUTHERN CALIFORNIA*

Rosi Ware - *MILLWARD BROWN INTERNATIONAL*

Wednesday Luncheon

with Valerie B. Ackerman, *President*

WOMEN'S NATIONAL BASKETBALL ASSOCIATION

The Great Debate General Session -

The Death of Mass Marketing

Moderator: David V. Spangler - *LEVI STRAUSS & COMPANY*

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Statement of purpose

"MSPA is a group of individual organizations united as a common body for the purpose of strengthening the mystery shopping industry through combined efforts and actions. It is the goal of the membership to improve and stimulate the acceptance, performance, reputation and use of mystery shopping services."

The primary goals of MSPA are to

- establish professional standards and ethics for the industry
- educate providers, clients and shoppers to improve quality of service
- improve the image of the industry through public relations and conduct
- promote the membership to other industry associations and prospect clients

MSPA member benefits include

- client referrals through listings in member directory and Web site
- client, staff & shopper educational materials
- annual conference and meetings discounts
- organized voice representing our industry (government, licensing, and other legal issues)
- educational seminars and workshops
- vendor discounts on freight, long distance, travel, etc.
- established standards and practices to guide our industry
- networking opportunities with other industry professionals
- quarterly association newsletter with industry updates & news
- voting privileges on association issues

Elected officers

President: Mark Michelson, Michelson & Associates
President-Elect: Michael Bare, Bare Associates International
Secretary: Marci Bikshorn, Service Excellence Group, Inc.
Treasurer: Elaine Buxton, Confero

Board of directors

Greg Cole, Maritz Marketing Research
Suzy Sligh, Elrick & Lavidge
Gene Jones, Market Image Florida
Nicholas Samson, Service Dimensions International
Beverly Gleason, Mystery Shoppers
Todd Rapp, KTR Creative Resources
Vickie Henry, Feedback Plus
Pat Blackwell, AIM Field Service

Committee chairs

Professional Standards and Ethics: Paul Lubin, Barry Leeds Associates
Communications: Peter Thorwarth, Better Marketing Associates (BMA)
Meetings and Programs: Leslie Gorman, Merchandising Specialists
Govt. Relations: John Connor, Quality Assessments Mystery Shopping
Membership: Marilyn Whelan, Shoppers International
Technology (Co-chair): Sean Young, Secret ShopNET
Technology (Co-chair): Don Simons, Audits and Surveys Worldwide

uses for mystery shopping, and how companies should be qualified to provide such services," says Michelson. "In addition to developing our own industry standards, ESOMAR [The European Society for Opinion and Marketing Research] has invited us to provide input for their new guidelines for mystery shopping, as it applies to marketing research."

Private investigators?

Due to misunderstandings of how mystery shopping works and resulting abuses of the service in the past, several states have enacted laws

requiring the licensing of shoppers as private investigators. "MSPA believes integrity investigations of employees using anonymous resources should require private investigator licensing in certain cases, while other uses of mystery shopping, such as service evaluations or operational auditing, should not," says Michelson. "Many clients are simply seeking the point of view of the average customer. Such customer-focused clients use mystery shopping reports as training tools to improve customer service, not as evidence to fire employees."

Government relations, marketing

guidelines, client and staff education, recruitment tips, and project management guidance are some of the issues MSPA will address in 1999. Another focus for MSPA, through use of the member directory and Web site, is to provide exposure for members and increase their new business opportunities.

Global scope

Another important aspect of MSPA is its global scope. MSPA already has many international companies among its membership. "The practice of using mystery shopping as a tool to improve customer service is in its early stages in Europe, Asia, South America and the Middle East. We have the foundation and resources to promote our ideals to a worldwide audience," says Michelson. "MSPA has already been in contact with companies from around the world, including China, Egypt and Argentina."

In November, Michelson and Bare also met with representatives of

ESOMAR and several European mystery shopping companies. MSPA plans to host a joint conference with ESOMAR in 1999 in Europe regarding international mystery shopping. "We are looking forward to working closely with other associations interested in promoting a credible resource for information on the mystery shopping industry," Michelson says.

Annual conference

The 1999 Annual International Conference will be held in Phoenix in mid-May. This conference will provide attendees with networking opportunities and educational workshops focusing on marketing, independent contractor utilization, technology updates, vendor relations, and legal education. Anyone with an

For more information about MSPA, the annual conference and mystery shopping in general, visit the MSPA Web site at www.mysteryshop.org.

For membership information, contact MSPA Member Services at:

Mystery Shopping Providers Association
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'Voice of the customer' disconnects still exist in most companies

By John Goodman and Colleen Bush

Editor's note: John Goodman is president of TARP, an Arlington, Va.-based firm specializing in customer service and satisfaction research. Colleen Bush is a measurement manager at the firm. They can be reached at 703-524-1456.

Getting close to the customer and listening. These have been the buzzwords of the '90s. As we

approach the year 2000, how much impact has the "voice of the customer" (VOC) had on improving customer service? Not enough. Our work on strategic customer retention studies and customer feedback tracking systems has taken us into many corporate departments concerned with VOC, including market research, consumer affairs, quality, and customer service. Often when we are hired, our clients tell us

that they are frustrated because their VOC survey findings are not always actionable.

One company in the travel industry unsuccessfully spent about five years trying to get a VOC process in place. Department after department tried to develop a plan but did not have the proper budget and did not bring other departments into the planning process. Finally an interdepartmental team was

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developed, with senior management oversight, which planned the process and was given adequate budget to implement the program. While the process had a promising start, later reorganizations and downsizing led to the disappearance of the original inter-departmental team and a lack of follow-through from the original oversight/senior committee. The VOC function moved from one department and manager to another, each with various degrees of company/product knowledge and survey research skills. This company is now reassessing what went wrong.

Two years ago¹, TARP identified five major problems which lead to ineffective VOC processes. The major disconnects, which were extracted from a survey TARP conducted with 22 North American companies, are:

- lack of a unified plan for collecting quality, customer satisfaction, and market research data;
- lack of an integrated analysis of the data to produce a unified picture of quality and customer satisfaction, drawn from all the data sources;
- lack of a conversion of survey research findings into revenue implications;
- lack of communication and translation of information to management in a manner that provokes action;
- lack of an integrated tracking system to see if important issues raised by the VOC were ever fixed.

These disconnects all relate to a non-systematic approach. TARP has noticed that these disconnects are still quite widespread and that many companies are asking themselves what they are doing wrong. In fact, in the past year a few of TARP's clients have asked for a review of best practices of corporate research departments to help with their own internal assessments of their VOC process.

TARP used a few different approaches to get at this information: 1) a benchmark survey of 15 American and Japanese international manufacturing companies; 2) an evaluation of the departments of companies that TARP consultants have worked with recently, which span multiple industries.

The benchmark survey

Although some companies have

made headway in resolving some of the disconnects, the findings in the May 1998 TARP benchmark survey of research managers from 15 major manufacturing companies found that many of the disconnects still exist. Below are some of the findings that illustrate that many of the disconnects are still prevalent today and that the process is fragmented.

- Two-thirds of the companies had separate groups collecting product needs and quality data, "how to go to market" data, and "after sales" customer satisfaction data.
- All but three of the 15 multinational companies designed the product in their home (headquarters) country and

needs and quality data, "how to go to market" data, and "after sales" customer satisfaction data). These units also develop the overall data collection plan for surveys, complaints, and internally-generated data. They convert their data into number of customers at risk and often directly into revenue implications. Finally these units are heavily involved in the business planning process and develop the ongoing company strategy in direct conjunction with the management committee.

The evaluation

Observing both best practices and failures for the VOC process showed that there were some other fundamen-



sent the product to the other parts of the world with instructions to "do research on how to sell this standard product in your part of the world."

- Fewer than a quarter of the companies conducted a unified analysis of manufacturing quality/warranty data, survey data and customer complaint data which was converted to revenue implications.
- Fewer than a quarter of the 15 companies conveyed their VOC results to management in an interactive manner that got management directly involved with the data.

The companies in this sample that were effective in the VOC process had unified the collection of data (product

tal issues that had to be present in order to solve the disconnects.

- Corporations should regard the VOC process as an investment. The VOC process should be considered part of the basic infrastructure of the organization and should be one of the last budget items to be cut. In fact, in times of scarce financial resources, the VOC process can help identify and prioritize where to invest. Successful companies seem to be aware that VOC information is an investment and they are willing to pay for it. This may be because they convert the VOC findings into revenue implications. Many less successful companies either never make this initial investment or skimp

during downsizing and reorganization initiatives to save costs.

- The VOC process needs corporate-wide commitment. The VOC process should have corporate-wide commitment across departments and up and down the various levels of the organization. The planning, implementation, and reporting should not be the sole responsibility of the survey research department. The role of communications should not be underestimated. Clearly understood channels of communication should be in place and responsibility should be assigned for communication of the plan. Successful companies have communicated the plan ahead of time to all company constituencies (including finance, planning, marketing, product development, and customer service) and seek input to the research planning process, have regular data reporting and translation mechanisms, and seek feedback on the back-end for the usefulness of the information. Successful companies have communication and understanding to/from all employees, input and feedback from a group of survey users, and oversight from a senior management committee.

- Professionals should manage the VOC process. Many companies ask us where the VOC process should reside within the organization. TARP has noticed that the location of the department is not as relevant or predictable to success as having an adequate budget, a corporate-wide commitment, and lastly, the correct professionals in place to manage the VOC process. The person managing the process should have good company, organizational and product knowledge to assure that all of the needs and requirements of the research users are understood and integrated into the plan. The manager should have good communication and translation skills to move the VOC plan horizontally and vertically throughout the organization. Last, the manager should have a good understanding of survey research and/or have support staff to fulfill this function. This will assure that sound research methodologies are practiced and that the implications of the research findings are reliable and valid.

Must be well managed

Our conclusion: The process can work if it's well managed. Two companies which have VOC processes which appear to work well are Harley Davidson and AT&T. While neither company has a perfect system, they have dealt with all of the pitfalls identified above. Signs of success are Harley's backlog of orders and AT&T's recent Baldrige Award.

Getting to a successful VOC process is an implementation challenge. For example, a Midwest health care company realized that its VOC process was not working and banned all surveys until a needs assessment and new plan was developed to assure that the firm was maximizing its resources. A company-wide team of operational managers was formed, lead by the strategic planning and analysis department with oversight by a senior management policy committee. The integrated team identified gaps in the VOC process and brainstormed and developed a VOC plan that brings all constituencies into the process. The firm is taking the plan

back to its policy committee for approval to implement and appear to be moving in the right direction.

This example is indicative of a widespread discovery that the VOC process is not always working. What is encouraging is that many organizations are undergoing some basic self-examinations to assess where they have gone wrong and what they can do to be more successful in getting close to the customer. While there may be a few companies that are not convinced that the VOC process can work, most companies seem to have the basic belief that a VOC process makes good business sense and are taking steps to reassess their VOC process. Companies that admit that this examination requires some patience and reengineering will be prepared for the challenges of the next century in adapting to rapidly changing technologies and customer needs. ¹⁴

¹⁴John Goodman, Scott Broetzmann, and David DePalma, "Maximizing the Value of Customer Feedback." *Quality Progress*, December 1996, pp. 35-39.

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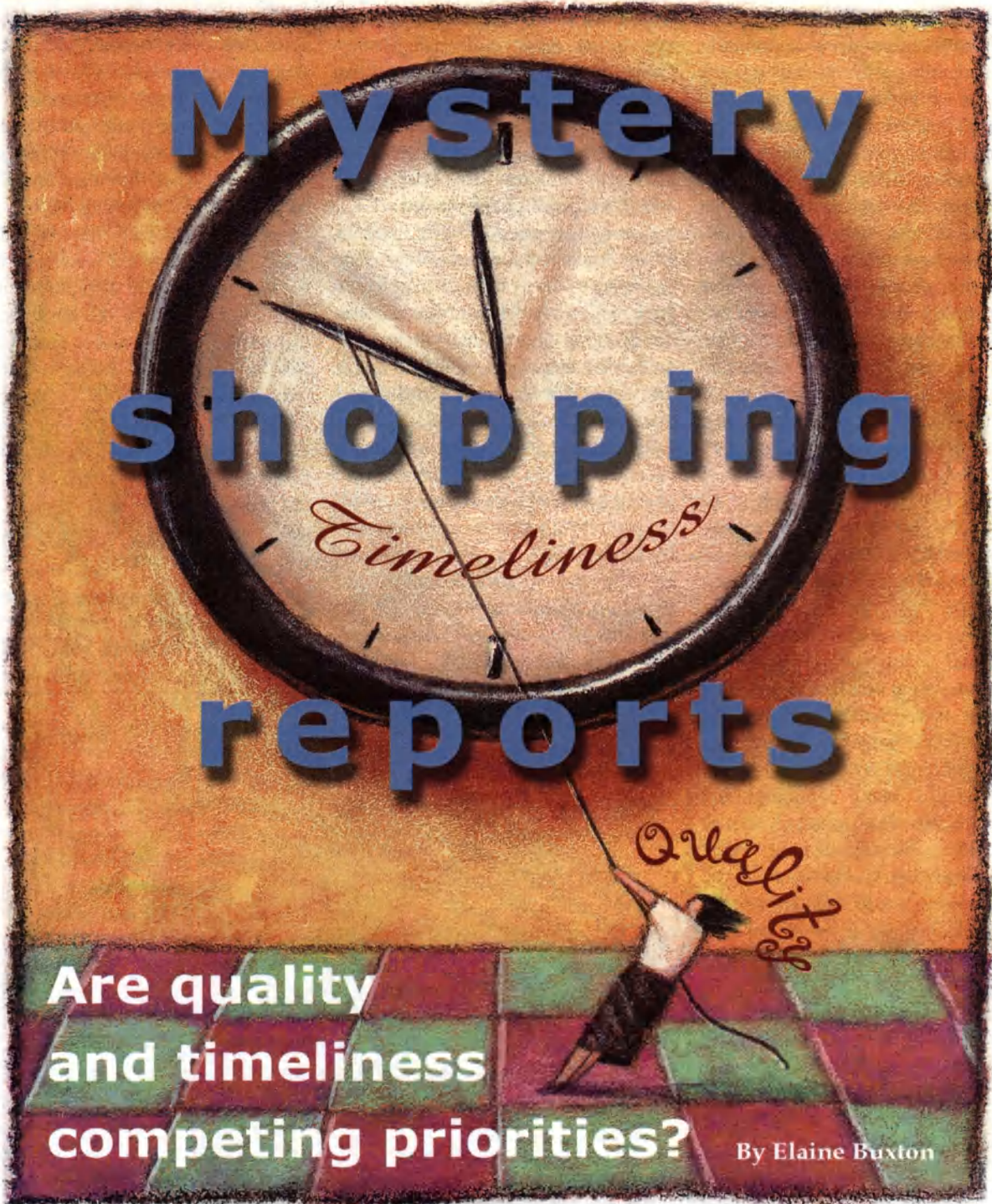
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**Are quality
and timeliness
competing priorities?**

By Elaine Buxton

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Clients of mystery shopping companies are increasingly demanding speedy reports. Without question, the widespread availability of the Internet, e-mail and

interactive voice response (IVR) have forever changed mystery shopping reporting. But is faster necessarily better? Are sacrifices in quality being made for the sake of speed? Are clients even aware of the sacrifices being made?

Quality mystery shopping programs result from appropriate design and implementation of each program component. Assume that a well-designed

program would include clearly defined objectives, a mystery shopper evaluation form addressing measurable criteria or behaviors over which employees have control, appropriate shoppers and instruction, an appropriate visit schedule and timely reporting. The final component — reporting — is the focus here. Reporting includes communication from shopper to shopping company, from shopping

company to client and from client to the field.

If your shopping program's goal is to provide measurement and incentives for specific front-line employee behaviors, then employees must be able to trust the validity and quality of the reports. Companies that use mystery shopping services are demanding — they want quality reports in a timely manner. Sometimes, the quality priority competes with the timeliness priority. Which one should win? Here are some issues to consider as you weigh each of them, so that the method of reporting does not interfere with the objectives of your shopping program.

- Report validation. Each shopper visit and report must be validated. Most companies validate using a cash register receipt showing the location shopped, the date, time, items purchased, etc. A reputable shopping company will consider a shopper report to be fiction until it is validated. Having shoppers report to the shopping company via Internet or IVR speeds up the reporting process, but reports should not be 100 percent accepted until validated. Internet and IVR reporting raise the question "Could shoppers sit in their living rooms and make up their answers?" Waiting for a mailed or faxed receipt is a small price to pay for preserving the quality and integrity of the shopping program. A receipt can prove that the shopper visited at the right time of day, the right day of the week, purchased precisely what was required and visited the correct location.

- Program value. If the objective of your program is to encourage employees to serve customers well at all times, then how instantly should you report to the store level? For example, if all locations are to be shopped monthly and reports are due precisely at month end, then the shopping company must schedule visits early in the month in order to provide valid on-time reports. Employees soon learn that shops take place at the beginning of the month and tend to relax for the remainder.

An example: At a retail store recently, a customer asked an employee for assistance in finding a certain item. The employee asked "Is today the



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10th or the 11th?" When the customer responded that it was the 11th, the employee said, "OK, then it's on aisle nine." The customer asked, "Why did you ask me the date?" and the employee replied, "Because today is the 11th of the month and we always get mystery shopped by the 10th. If you're the shopper, I have to walk you over to the item you're looking for so I'll get all the points on the shop report. Our store manager is a real stickler about that. But today's the 11th, so I can just tell you where to find the item."

Obviously, this employee's perception of the mystery shopping program is not what the company intended and the company is not maximizing program value by reporting so quickly.

- Program quality. Validation is just one part of the screening and quality review of mystery shopping reports. Some companies provide screening services only, simply making sure all questions are answered and commentary, if required, is complete. Some companies provide full quality review services, reviewing and read-

ing each individual report to check for consistency of commentary with scores provided. A screened report can be delivered to the client faster, since the shopping company need only check that all questions are answered. A quality-reviewed report requires added delivery time, since the full review itself takes more time.

Whichever method is selected, the shopping company must be expected to reject reports that don't meet the criteria required and send another shopper to visit the location. That process takes time. Expect a screened report to be rejected if answers are missing; expect a quality-reviewed report to be rejected if answers are missing, inconsistent with scores or if comments seem biased or unfair. Full quality review will result in more rejections from the shopping company itself, before the report hits the field. Screening will result in more requests to re-shop after the reports hit the field. Reports may seem slower if they are quality reviewed by the shopping company, but that may not be the case, since requests for re-

shops from the field can ultimately slow up the end-of-period tabulations. Quality will take time — whether on the front end or back end.

- Speed to the field. It is not speed of reporting to the client corporate office but speed of reporting to the field which will most likely change front-line behavior in the short term. Working with a reputable mystery shopping company allows a client the comfort to permit reports to be sent directly to the field, rather than to a central corporate office for disbursement. This level of comfort requires validation plus, at minimum, a screening process. Otherwise, employees will spend their time refuting the reports rather than acting on the information they receive. Ask yourself if you want corporate management spending time answering questions such as "Suzie works at the location down the street, but the shopper report says she works here. Did the shopper visit the wrong place? Doesn't somebody look after this?" A fully reviewed shopper report results in fewer questioned reports than a simply screened one. If you plan to speed reports to the field, motivation can be maintained by more random shopping periods, so employees will not know exactly when to expect the next shopper visit.

- Cost considerations. For companies requiring very specific shopper scenarios, speedier reporting may actually cost more. Why? The specific shopper scenario will likely enable employees to spot the shopper based on the shopper's report. So, instead of rotating the shopper to that location again in a few months, the shopping company must send a new shopper each and every time — a costly move. Employees at quick-service restaurants serve hundreds of customers per day and are not likely to recall the circumstances of individual customers over the previous day or two. By contrast, employees selling big-ticket items such as furniture, appliances, computers or fitness equipment may interact with only a few customers each day, so they may more readily recall the shopper's visit based on the scenario, the day of the visit or the time of day. Specifics

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increase the probability of shopper recognition. The less specific the shopper scenario, the faster the reporting can be without identifying the shopper.

The speed afforded by the Internet, e-mail and IVR should not be ignored. Even if there is an initial rate of 8 percent rejection from failed validity, the ability to capture data now, pending later validation, has its advantages. For example, if 1,000 reports are conducted today and reported via Internet by tomorrow, then 1,000 reports can be at least screened tomorrow and the following day. If it takes two days for mail to arrive (i.e., validation via receipt or otherwise) then 92 percent of the reports, on average, could be released to the client within 48 hours of the shop date.

Faster reporting opportunities afforded by Internet, e-mail and IVR may also reduce costs, since they are usually less costly for shopping companies to set up and administer. Bypassing postage, printing, and telecommunications costs significantly reduces the cost of conducting shopping programs, putting them within the reach of a wider range of corporate budgets.

An appropriate balance between timeliness and quality results from a series of well-considered trade-offs. If the shopping company will be conducting complete quality reviews of the reports, then sending reports straight to the field is an appropriate choice, leaving the corporate office to look at trends shown in tabulations at the end of each reporting period. If your corporate office plans to designate a staff member to perform the quality review, then consider an up-to-date benchmarking program to take advantage of speed and accommodate quality concerns. For example, a monthly program might produce a weekly communication to stores stating last month's aggregate scores along with aggregate month-to-date scores to keep motivation in the field high, since employees will not know where their own scores fall until month end. The process of sharing trend analysis among stores creates opportunities for creative and

innovative incentive programs. Stores can compete against their own previous scores, against the aggregate for the month or year-to-date or against shops conducted at competitor sites, all while the corporate office is receiving extremely timely, validated electronic data about specific visits. The corporate office may then disseminate specific shop performance data after the end of the shopping period.

Timeliness or quality?

Experienced mystery shopping companies have faced the quality-versus-timeliness issue with a variety of clients and can tailor programs to suit your unique requirements. In fact, a shopping company with integrity will tell you up front that this issue may arise from time to time. Well-defined objectives for the program will guide both you and the shopping company in determining the best approach.

It all comes down to this: if faced with a choice, which would your shopping company choose — timeliness or quality? If your company has a monthly shopping program and the last report for the month arrives at the shopping company and its validity is questioned, would you expect the company to send it on to you and hope it gets by? Or would you expect the company to contact you, state the problem and explain that the final tabulation report would be delayed by a day?

Marketing research people often quote the old adage "garbage in, garbage out." All of us involved in the industry must be careful not to give undue credence to reports simply because they are fast or electronically reported. The source of a shopping report should be a well-designed program. Clear objectives, a mystery shopper evaluation form addressing measurable criteria, appropriate shoppers and instruction, an appropriate visit schedule and reasonable timeliness are more important to an overall shopping program than the method of transmitting its results. Perhaps an updated version of the adage should read "fast garbage in, fast garbage out." ☞



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So you want to be a service leader...

By Peg Anthony



Editor's note: Peg Anthony, Ed.D., is vice president, Macro International Inc., a Calverton, Md., research firm. She can be reached at 301-572-0968 or at anthony@macroint.com.

For today's organizations, focusing on customers is a critical factor for success. It impacts customer retention and acquisition, product/service innovation, employee turnover, market share, and financial performance.

These days, customers don't have the time or patience to deal with problems. They no longer hesitate to make a change if they are dissatisfied. Unfortunately, most customers won't tell you that your services aren't up to par.

- Five times as many customers switch to a competitor because of service-related problems than because of

product- or price-related problems.

- For every customer who complains, 20-30 others have problems (at least six of which may be serious) that you never hear about.

- While only one dissatisfied customer in 20 will complain to you, all 20 will complain to their friends — and each of them tells an average of 18 people about the problem.

- This means for every complaint that you receive, as many as 360 people have likely heard similar complaints or worse.

Increased competition, combined with changes in economic conditions and consumer lifestyles, significantly affects customer behavior and preferences. Your customers have higher expectations and more choices than ever before; in addition, they're more knowledgeable and sophisticated with regard to the marketplace and the goods

and services available to them.

Developing a customer focus in your organization is more than a necessity in today's marketplace. It is an opportunity to differentiate your services, provide valuable benefits that your customers will recognize and appreciate, and secure a stable and loyal customer base. To become a leading service provider, ask yourself and your organization the following questions.

Establish a customer-driven organizational culture

Does your organization have a clear understanding of who its customers are? Are there clear and common understandings between managers and employees?

The more hierarchical the organization, the more likely the staff is to consider their boss as their prime customer.

Staff may get mixed messages about who their customers are, and may not completely understand customers' wants and needs. In the ideal, all managers and staff have a clear understanding of customers' needs and customer segments.

Does your organization have a customer-oriented mission, vision and organizational values? Is that customer orientation reflected in all of its messages?

Do the senior managers emphasize the central role of customers in the mission of the organization? Do all managers and staff, in turn, reflect the same sense of customer-driven mission? Customer-driven organizations demonstrate their commitment to customers by focusing on their needs during the organization's strategic planning process, and then articulating customers' interests in all of its communications.

What are your organization's goals and objectives regarding service excellence?

Service leaders set clear goals and objectives, state them in measurable terms, and establish accountability at appropriate levels. Service improvements may falter if the organization fails to be specific.

Does the management team review customer feedback and related data?

Some managers review customer complaints on an anecdotal basis. Some are interested primarily in the organization's overall "score," as the bottom line. More and more, service organizations are using customer data as a standard method for making decisions. Managers regularly review customer feedback summaries, just as they review financial and other performance data. Service providers also need clear feedback from customers about their performance on an individual level.

What is the level of management commitment to service quality?

In some organizations, managers pay lip service to service excellence as a "motherhood and apple pie" issue. When managers demonstrate service leadership by their actions, decisions, and concrete support, the rest of the

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organization will follow. Managers have another important role to play as well. They must determine how aggressive the organization will be, and how high it will aim toward service excellence.

Does your organization involve its customers in future planning?

Does the organization inform customers of decisions made? Are customers consulted when key decisions are under consideration? Does the organization test new ideas, initiatives, products, and services before launching them? To what extent are customers at all levels part of planning and decision-making process?

Is there an organized customer service change initiative established within your organization? Does it extend to all field units or other service delivery providers that are part of the organization's service delivery network?

Organizations today are busy. To implement a change effort, it may be necessary to designate one or more individuals to serve in a leadership role. Perhaps this has already occurred. Most initiatives need to be well organized, with sufficient funding and staffing, with tangible management sponsorship and regular attention. Dedicated resources and senior commitment are needed at all levels of the organization, particularly in field structures.

Improve your products and service performance

To what extent are your organization's service processes customer-friendly?

Customers are rejecting bureaucracy, red tape, and paperwork. Do customers think it is relatively hassle-free, or very difficult, to do business with this organization? Do they avoid interactions with your organization at all cost, or refer their friends to you for the best service possible?

What does your organization do when a customer complains? How does your organization recover when things go wrong?

Since customers have their own unique and individual views of the kind of service they want and need, it is like-

ly that customers will be dissatisfied from time to time. Does the organization have a game plan for handling mistakes and complaints? Is there a mechanism to follow up with customers to be sure that they are satisfied, since many will not complain directly if they are dissatisfied? Recovery may be the organization's best tactic for winning over unhappy customers. However, recovery is an art, and needs to be planned in advance as a service strategy. Once the customer has been attended to, such complaints and mistakes also need to be tracked to examine trends, root causes and appropriate remedies in systems, processes, and staff skills.

Has your organization benchmarked service processes with the best service leaders?

Customers gauge the service they receive in comparison to the services they obtain elsewhere. Not only can organizations learn useful tips from the best practices of service leaders, they can also gain insights about how customer expectations may be shaped by others.

If applicable, to what extent is there alignment in your organization's services worldwide?

Service delivery in complex organizations is dependent on a delicate set of relationships. Often, a central headquarters or corporate office provides direction and support, but has no direct control over the field service delivery. One example of this phenomenon is franchised operations. In such cases, organizations have found that it is important to involve the field managers and staff, along with any suppliers and partners, in service improvement initiatives.

To what extent is your organization focused on service enhancement, as well as improvement?

In their desire to be as efficient and cost conscious as possible, some organizations settle for fixing what's broken. They fear that enhancements will drive costs up, with little return on the investment. However, service organizations may find that creating enhancements may be the most important element for future survival. They are forced to do "more with less" to meet the continuous escalation of customer

expectations. At the same time, they must distinguish themselves from the competition. Interestingly, this has been true in government service organizations as well as the private sector.

Are employees empowered to solve customer problems at the point of contact?

Customers want their problems resolved when they complain. That means that front-line employees need empowerment to make decisions at the level closest to a customer interaction. If employees have no authority, they know it and behave accordingly. And customers will know it as well. Service leaders establish guidelines for employees so that many problems can be resolved easily for the customer and cost-effectively for the organization.

Do your organization's policies and practices allow for flexibility?

Inflexible, "by the book" service is ineffective in today's service environment. Has the organization considered which policies and practices get in the way of front-line staff? Do employees

know how to vary the treatment of customers, and to balance the interests of the customer with those of the organization? Are managers ready to relinquish control? Are employees ready to make good decisions?

What common service standards ensure quality service throughout all of your organization's functions and offices worldwide?

Consistent customer service standards set expectations about staff and organizational performance. To what extent has the organization established and communicated measurable standards? To what extent do those standards reflect customer preferences? To what extent has performance been evaluated using customer feedback vis a vis the standards?

Are internal customer-supplier processes clearly understood?

In service organizations, there are two kinds of staff: those who serve customers directly, and those who support those who do. Everyone has a role in service delivery. It is sometimes diffi-

cult for those who work in internal service functions to appreciate the front-line customer experience. Conversely, front-line service providers often express frustration because they feel the organization imposes hardships on them, making it more difficult to serve customers. These and other tensions surface among service organizations that have a central headquarters or corporate office and a field structure. To what extent has the organization attempted to align internal and external service? To what extent is internal service viewed as a necessary ingredient of high quality external service?

Train and develop your employees as service ambassadors

What is the level of customer interaction skills among the staff and managers?

Do the skills reflect both business and human interaction awareness and abilities? Frequently, the service provider's skill in handling a customer can make the difference. Customers expect friendly, caring service, and will com-



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plain when it is missing. Leading service organizations make major investments in formal training and coaching for all levels of staff and managers. Highly trained employees and managers use business and human skills internally and externally.

To support greater degrees of empowerment and flexibility, to what extent are employees and managers trained in problem-solving skills?

Even if the organization empowers its employees to handle problems, they won't do it if they feel ill-prepared. They will pass along the problems to supervisors. Supervisors play a key role in giving permission and protection to employees. Well-established skills at all levels achieve front-line problem solving.

Are supervisors prepared to coach employees on their customer service skills?

Some supervisors are reluctant to coach. Others have a keen eye for effective customer service skills and give constructive feedback. Supervisors must also model appropriate behaviors for employees to take them seriously. To what extent are supervisors willing and able to coach these skills?

Do managers and supervisors

understand how to manage a customer-driven organization?

Managing a customer-driven organization isn't rocket science. However, the most effective service managers and supervisors are committed to continuous service improvement, understand the change process, and accept their role in supporting service providers and removing impediments to service excellence. Are managers and supervisors well educated about how to manage? Do they have clear plans for improving service in their unit? Are they using commonly accepted customer service tools and techniques?

How effective is your organization in managing and negotiating customer expectations?

Do employees hide behind rules? Or are employees well skilled at negotiating win-win solutions for customers?

Make quality service matter: use rewards and reinforcements

Does your organization select employees on the basis of their customer service skills, attitudes, and knowledge?

To what extent is customer service experience a major part of selection criteria in filling positions in the organization, including employees and managers? Is customer service experience a

"nice to have" or essential criterion? Is customer service used consistently for selection decisions?

Are employees promoted on the basis of their customer service skills? Are supervisors chosen because of their ability to coach service excellence?

For front-line service positions and supervisors, service organizations establish a strong link between promotion and service excellence. Are the most service-oriented employees in the organization being promoted?

What are the rewards and recognition mechanisms for employee service excellence?

Does the organization reinforce the customer service values it espouses? If rewards and recognition are given, are they going to the "right" people, i.e., staff who are regarded by their customers and peers as the best service providers? Are rewards and recognition given on an annual basis, or more frequently to reinforce behavior every day? Are both tangible and intangible methods used frequently and regularly?

Ask your customers: use measurement and feedback

Does your organization maintain a customer database?

It is nearly impossible to establish a system of customer measurement without keeping records of who your customers are. What methods are being used to do so?

Does your organization have baseline data on customers and service issues?

What services do your customers want? On what basis do they judge the service they are obtaining now? What is the current level of customer satisfaction? How do local offices vary? What services need the most improvement? What enhancements would strengthen the organization's relationships with customers? A thorough baseline that answers these and other questions is helpful in making decisions and charting progress.

Does your organization have a system for gathering and using customer feedback?

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The most useful customer data is obtained by organizations regularly and systematically, using multiple methods at multiple times, including transaction-based feedback from specific customer events or interactions. The organization needs this information at the central headquarters or corporate level; local offices need it for their own improvement efforts. We recommend both satisfaction and loyalty measures to gauge the extent of customer satisfaction. Not only is it important to measure customer feedback, but it is vital to use the data to drive improvement efforts. Customers will be looking for improvements if you have asked them for feedback.

Does your organization obtain feedback from field representatives, partners and stakeholders as another dimension in its measurement of service delivery?

In addition to customer data, the organization will benefit from feedback from others who are involved in delivering services to customers. This data is part of the partner/stakeholder feedback that enables an organization to view its entire service delivery system. To what extent will this internal feedback become a regular part of the service measurement process?

What can your organization do to help employees deliver high quality service? What gets in their way?

Employee surveys are often conducted to determine how satisfied employees are with their work and working conditions. However, to improve service delivery, it is also useful to seek their input about the systemic issues that get in the way of providing service. The organization can learn how to best support them as service ambassadors.

Capitalize on your brand: communicate and market

Does your organization report to employees, customers, stakeholders and partners regularly about how it is doing?

Many organizations find that an open, honest information exchange with customers and others promotes continuous improvement.

How does your organization communicate internally regarding service per-

formance?

Is there a fear of admitting service failures? Is information communicated regularly, or on a spotty basis? Does the organization celebrate its service "heroes" and organizational successes?

Are your organization's external communication and marketing efforts linked to customer loyalty strategies?

Is there any attempt to leverage positive customer feedback, such as testimonials? Is there a concerted effort to build loyalty and to leverage customers' goodwill?


Does your organization's name have any brand identity among customers?

When customers hear your organization's name or acronym, does it conjure positive thoughts? Does it symbolize high quality service and caring customer support? If there is no apparent link, the organization may want to review how it can use its marketing efforts to increase its standing with customers. Customers who know the brand, and view the organization positively, will have a valuable emotional attachment — one that encourages customer loyalty and brings customers back.

Does management communicate about customer service excellence to employees?

Is management doing all it can to reinforce its organizational strategies for service excellence by continuously communicating it to employees? Does management emphasize customer satisfaction, or emphasize the importance of going the extra mile? Is communication top-down, bottom-up, or both?

Better services go hand in hand with better service delivery

As you focus on becoming a service leader, be sure to consider all of the factors that contribute to service excellence. Often, improvement efforts focus on just one aspect of service — training staff, improving service offerings, organizational effectiveness, or learning more about customers' needs and wants. Few organizations pull all of these pieces together. 

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Mystery shopping for manufacturers:

What's happening at retail?

By Laura S. Livers

Editor's note: Laura Livers is president of Shop'n Chek, Inc., an Atlanta mystery shopping firm. She can be reached at 800-669-9939.

You're a manufacturer who invests significant capital in establishing training programs for the retail employees who market and sell your products. You spend considerable time, effort and money to design and provide elaborate displays and models of your products in retail stores so consumers may try and test your products. You create compelling brochures, marketing pieces and point-of-purchase materials designed to draw in and educate potential buyers.

But do you know whether your efforts and investments have any positive impact on what occurs at the key moment of interaction between retail salespeople and potential customers?

Have your efforts ensured that:

- salespeople are proficient in explaining and demonstrating your products;

- your marketing materials are utilized to their maximum advantage;

- salespeople understand and encourage use of your displays and models.

Or are the salespeople providing little and/or incorrect information to potential customers? Are they using your products to sell against the competition or perhaps not even mentioning your products at all?

Mystery shopping is a key method used by many manufacturers to obtain objective information regarding what is actually happening at the retail level. This information can then be used to re-focus or enhance training programs and to incentivize salespeople.

Mystery shopping has been used as a research tool by manufacturers for over 25 years, beginning in the early 1970s when the majority of programs focused on the consumer electronics industry.

Carol D. Cherry, chairman of Shop'n Chek, an Atlanta-based mystery shopping firm, recalls a product presentation program instituted by Shop'n Chek in the early 1970s for a major

consumer electronics manufacturer seeking to find out how salespeople were presenting this manufacturer's new line of color television sets. "Some of the comments made by retail salespeople about this manufacturer's new line were absolutely wild," says Cherry, "but the most incredible was the salesperson who told a mystery shopper that in order to keep the color on the TV correctly calibrated, there was a person in New York who actually sat in front of a wall of TV screens — one for every new TV purchased — and kept the color in check. Needless to say, this manufacturer realized that further training was vitally necessary and they quickly instituted additional training."

Stories like this often emerge through mystery shopping programs structured to assess how manufacturers' products are displayed and sold at retail. Quite often, mystery shoppers will report salespeople who, when asked about a given product, profess, "I don't have a clue what it does." Another example might be the computer sales-

person who, when asked about the difference between hard drive sizes, explained, "Well, you know sometimes you might want a larger unit so you can stack things on it."

As consumer products become increasingly technical, manufacturers face many challenges in ensuring that the salespeople who sell these products understand how the products work and can effectively convey features and benefits to customers. Finding out about and correcting the confusions and misconceptions held by salespeople has led to an increase in retail sales and brand loyalty for many manufacturers. Product presentation mystery shopping programs are one of the few key ways that manufacturers can learn about these confusions and misconceptions.

Simplicity is key

Product presentation programs are designed to measure just that — how retail salespeople present a given manufacturer's products at the retail stores where they are employed. Such programs assess both the physical demonstration of the product, as well as what is verbally communicated by the salesperson to customer about the product. There is a fine art to structuring and implementing a successful product presentation mystery shopping program, and simplicity is the key to creating a program with strong results.

The objective questionnaire

Using your training and promotional materials, your mystery shopping service provider will work with you to design a detailed, focused, objective questionnaire of approximately 10-15 questions. Ideally, only "yes" and "no" questions will be posed, and all "no" questions will require a response from the shopper for clarification.

Your service provider might also suggest the use of "pick boxes" that allow shoppers to check off the features and benefits that are mentioned. This will allow an analysis of the percentage of time certain features and benefits are mentioned over others. Many manufacturers find that if most salespeople are not mentioning certain product features, they may not understand those features well enough to discuss them.

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This information points to an area where further training is required.

Another key type of data that can be gathered by mystery shoppers is whether or not your products are in stock in retail stores. Tabulated data can show the percentage of time your products are not available in certain retail locations and you can take steps to ensure that adequate stock is shipped to retail stores so that your products are always on the shelves.

You might also want to include a "general comments" section that encourages mystery shoppers to comment on anything they find significant or interesting during the course of completing the mystery shop.

Communicating results: keep things positive

Once shoppers visit the specified retail locations that sell your product and results are compiled, sharing those results with training and other personnel is the important next step in your program's success.

Some manufacturers choose to share data with retailers, and in some cases

even completed questionnaires, in order to further convey expectations. Others share data only with trainers who then communicate necessary changes to retail salespeople. The important thing to remember when communicating results is to keep things positive. Mystery shopping is best used as a tool to catch individuals doing something right, not catch them doing something wrong. Positive reinforcement and incentives go a long way toward encouraging retail salespeople to effectively sell and market your products.

What types of manufacturers use product presentation programs? Product presentation mystery shopping programs work successfully for any manufacturing firm selling products at the retail level. For example, Shop'n Chek has implemented programs ranging from those for car manufacturers interested in how their vehicles are presented in dealerships, to those for national and international cosmetic and fragrance companies wishing to assess how beauty advisors present skin cleansing products, makeup and

lotions. Other programs have included work with the computer industry, both hardware and software manufacturers, as well as the cellular phone industry, appliance manufacturers and numerous projects for the consumer electronics industry.

Training assessment and the benchmark program

For manufacturers that have not implemented training programs, a benchmark product presentation mystery shopping program is an excellent method for learning about areas where training is needed. In order to institute a benchmark program, manufacturers need to determine the six to eight key features and benefits of their product — essentially what they believe to be the key selling points of their product. The manufacturer should not announce to the retailer or retailers that the program is being implemented since the goal of the benchmark is to obtain a baseline of existing knowledge and level of service before training and/or incentives are rolled out.

Benchmark programs are generally four to six weeks in duration and are designed to examine a representative sample of all retailers selling a given manufacturer's product(s). Once mystery shoppers visit retail locations and complete their evaluations, the results are tabulated by the mystery shopping service provider and shared with the manufacturer. These results can then be used to develop training programs and materials for either in-house or outsourced trainers at the retail level. Tabulated data can also allow manufacturers to compare how one retailer is performing versus another. Armed with this information, manufacturers can tailor training programs for each retailer, if so desired.

Constant reinforcement

Some of the most successful programs are those that incorporate the mystery shopping program within the training program. Manufacturers roll out the training program and, at the same time, announce an ongoing mystery shopping program. In this way, training objectives are constantly being reinforced by monthly mystery shops.

Shop'n Chek Mexico instituted an



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ongoing program for a VCR manufacturer beginning in 1997. Results indicated that salespeople's lack of a basic knowledge or understanding of the manufacturer's products resulted in their expressing negative opinions of the products, and even recommending competitors' products to consumers the majority of the time.

Through the program, the manufacturer was able to pinpoint training and informational needs as well as differentiate problems in individual retail sectors. For instance, they found that certain retail sectors had much higher training needs than others.

If an ongoing monthly mystery shopping program is not an option, a second follow-up program to the benchmark should be implemented. These programs are best instituted once training has been in place for two to three months. They allow manufacturers to assess the effectiveness of the training program and assist the manufacturer in refining training materials and procedures for the future. Periodic eight- to 12-week programs can be implemented throughout retail chains to constantly

monitor training programs' effectiveness.

New product evaluations

Another program option is that for new products. Conducting programs as soon as new products are launched is an essential way to obtain a quick read of how the general sales market is presenting your new product. Armed with this information, manufacturers can quickly implement spot training as necessary for salespeople who require additional details regarding the new product's features.

Shop'n Chek worked with one car manufacturer in order to learn whether or not salespersons in the dealerships were using specially-designed training materials and were accurately describing and demonstrating this manufacturer's new car line. Shop'n Chek Philippines has worked with pharmaceutical companies interested in evaluating pharmacists' recommendations for their new product when consumers requested over-the-counter cold and flu remedies. The program also consisted of offering on-the-spot incentives when

the manufacturer's product was the first product recommended.

Designing an effective on-the-spot incentive program

On-the-spot incentive programs are designed to reinforce two to three key features of your product. Your service provider will work with you to designate the key benefits and features you want salespeople to mention — be they new features of an updated product, or elements that distinguish your products from the competitors'. Once features and benefits are decided upon, a short questionnaire is designed and mystery shoppers are sent out to interact with salespeople and experience the sales process first-hand.

If the salesperson mentions the key features designated, the mystery shopper will immediately congratulate the salesperson and award him or her, "on-the-spot," with a certificate redeemable for anything from a gift check to a lapel pin. Since the program has been promoted extensively, salespeople know that any customer who walks in the door could be the mystery shopper,

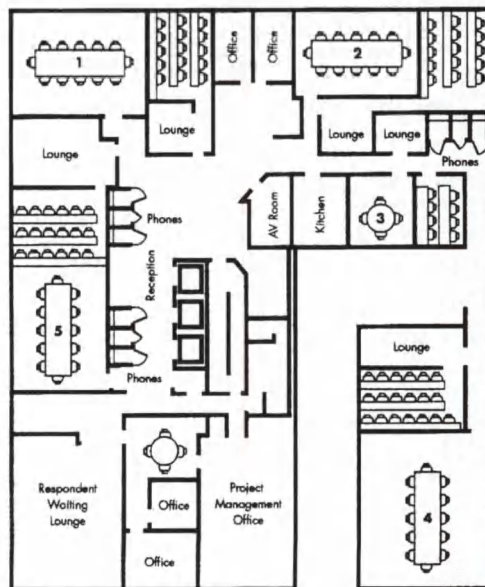
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The importance of announcing the program

An on-the-spot incentive program is only as effective as the manufacturer's ability to let the retail sales force know about the program. One consumer electronics manufacturer, who implemented a program with our firm during 1997, was highly effective in ensuring that salespeople knew about and understood the program's objectives and incentive opportunities. This manufacturer placed ads in industry and trade magazines, and sent newsletters, posters and brochures announcing the program to involved retailers. They even created a wallet-sized cheat sheet outlining the three key elements mystery shoppers were looking for.

While on-the-spot incentive programs provide a strong promotional push for a given manufacturer's products during the incentive period, and are of great interest for all involved, these immediate programs do not have the long-term effectiveness of the ongoing program where assessments

are made monthly, thereby reinforcing training objectives. Once the on-the-spot incentive program ends, many salespeople may go back to their old habits if they do not have the reinforcement of an ongoing program.

Structuring the incentive piece

Building incentives within the mystery shopping program is a key way to ensure program success. Your mystery shopping service provider can work with you to develop incentive criteria based on such elements as a salesperson's overall score, a retail location's overall score, or a district's or region's overall score.

Incentives can be anything from coupons for the manufacturer's products, cash, movie tickets or sporting event tickets, or other promotional items. Initial winners' names can be placed in a drawing for additional prizes at the end of the program. The most successful programs are those that incentivize throughout all levels involved in presenting and selling the product, including the salespeople, the employees or training organizations


that train salespeople, and the individuals who manage the trainers.

When competition is tight

The recent competitiveness in the cellular phone industry has led several major cellular phone service and accessory providers to embark upon mystery shopping programs. This is often the case when competition runs high in a given industry, and instituting programs can be a means for gathering vital competitive intelligence data. Many programs are structured so that mystery shoppers gather information regarding what the salesperson says about both the manufacturer who instituted the mystery shopping program, as well as about competitors' products.

Details regarding whether or not the salesperson recommended a competitor's product over the client's product can be easily obtained. In some cases, mystery shoppers will approach the salesperson and ask about a specific manufacturer to see if that manufacturer's product is recommended, or if a different manufacturer's product is recommended instead. Comparisons can be made between what occurs when the mystery shopper asks for one manufacturer's product first versus what happens when they ask for the competitor's product, including the reasons given by salespeople for encouraging one choice over another.

Evaluate and measure

Many manufacturers now face ever-increasing competition, nationally and globally, for their products. The retail environment in which their products are sold can have a direct impact on their sales. A successful mystery shopping program can evaluate and measure the product knowledge and sales skills of retail salespeople, thereby providing manufacturers with the objective data necessary to fine-tune their training programs and incentivize salespeople. Such a program can be a key element in a manufacturer's ability to educate and "sell" its products to the retail salespeople who in turn will be responsible for educating and selling the products to consumers. 

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Survey Monitor

continued from p. 8

the right answer), with an average of 5.4 percent of those age 55 and over guessing "God Bless America." Another 3.2 percent of all AmeriPoll respondents guessed "America the Beautiful," while nearly a quarter (23 percent) flat out didn't know.

4. Not everyone has a memory for dates, but 1776 should stick in every American's mind as the year our Declaration of Independence was signed. Yet over 40 percent of Americans didn't know the correct answer to this question. Most 18-24-year-olds aren't much on memorizing dates — nearly 60 percent did not know the year the Declaration of Independence was approved. But our youngsters are in good company, since nearly half (48 percent) of Americans age 55 and over didn't know it either. Those most likely to know the correct answer were the 35-54-year-old Baby Boomers, 72 percent of whom answered correctly. Once again, a gender gap crept in, with 65 percent of all male respondents answering correctly, compared to 55 percent of women.

5. Father of our nation and pictured on every dollar bill stuffed into a video game or change machine, George Washington was the correct response given by 88 percent of Americans. A better score by far than the other questions, but that still leaves nearly 24 million Americans thinking it was Abe Lincoln or Ben Franklin (two popular guesses for this question). There were no age or gender variants found among responses for this question.

The higher the household income, the more likely respondents were to give the correct answers, across the board. The most evident example of this tendency was the question about the Declaration of Independence: 46 percent of those with household incomes under \$25,000 answered correctly, with numbers rising steadily among income brackets to a high of 74 percent of those earning over \$65,000 — a 28-point spread.

Using a standard grading scale, where a score of 90 or above is in the

A-minus range, 80-89 in the B-minus range and so on down to 59 and under (which is failing), the four U.S. Census Bureau regions of the U.S. ranked as follows on the Maritz AmeriPoll American history quiz: the Northeast — C (71 percent); the Midwest — C-minus (70 percent); the South — D-plus (67 percent); the West — D (64 percent). For more information call 800-446-1690 or visit the AmeriPoll Web site at www.ameripoll.maritz.com.

Travel industry's slip is showing

You've come a long way baby, but you still have a long way to go unless the U.S. travel industry gets serious about the impact you have on business travel. Women business travelers are taking to the skyways, highways and byways in greater numbers than ever before. By the turn of the century it is estimated women will comprise 50 percent of the business travel market in this country, compared with 1970, when women represented one percent of the market. This could turn into an unprecedented bonanza for the travel industry to increase its revenues and, at the same time, develop and maintain strong brand loyalty.

First, however, the industry must start adjusting its way of doing business and giving women business travelers what they want. They don't want much, either, according to a national survey conducted by The Travel Group of Total Research Corporation, Princeton, N.J. "A change in attitude will go a remarkably long way to create strong brand loyalty among women business travelers for hotels, airlines, car rental services, airports and other travel-related marketers," says Andrew J. Brown, vice president of Total Research, who spearheaded the survey among 216 women.

The respondents, who travel more regularly than most women, told Total Research that travel companies do not cater to the female traveler. They feel strongly that male travelers get preferential treatment.

Respondents concurred that travel

companies would see an increase in their business by catering directly to women travelers and, in that process, would build a very strong brand loyalty.

Women are concerned about the lack of personal safety considerations among hotel, airline, airport, and car rental companies. Secondly, women resent more and more being treated as second-class travelers when compared with male counterparts.

Ironically, most serious offenders slighting women travelers are female employees of hotels, airlines, airports and car rental agencies. Women traveling for business reasons want parity with men among female flight attendants, check-in staff and other travel employees. They're looking not just for courtesy and friendliness but considerations in awarding upgrades, better rooms, nicer cars, etc.

The survey indicates that the hotel industry should pay particular attention to women's comfort and need for personal care items. Amenities such as hair dryers, irons, ironing boards and skirt hangers are seen as musts in hotels seeking to upgrade their services to women travelers. They're also on the lookout for healthier dining options in hotels. Improved room service food is high on their list, as is a greater willingness to admit female room service personnel to their rooms rather than men.

Schlepping luggage is an irritant among women travelers who feel that assistance should be provided by airline personnel for hefting bags into overhead storage bins, or when hiking long distances between airport gates and terminals.

The survey results reveal that most suppliers of travel services would benefit enormously from a marketing initiative directed at women business travelers. They would gain an immediate bonus by making women feel that a travel brand is "A brand for me," the survey showed.

These travel categories would enhance their images almost immediately by establishing reputations or perception positions such as the fol-

lowing:

- "You will feel safe with us."
- "Your woman-friendly travel partner."
- "We take the stress out of traveling alone."
- "Women and men deserve our careful attention."

Corporate travel departments and travel agencies can provide strong support for neglected women business travelers. These intermediaries should spend more time identifying those airlines, hotels and car rental firms that provide superior service to female travelers. Those that are serious about caring for women will avoid those companies who continue to treat females as second-class citizens.

Total Research learned just how important the female traveler really is in today's marketplace. For example, two out of every five overnight business travelers in the U.S. is a woman. The number of overnight trips they take is increasing annually, as is their need to travel on business overseas.

The study includes a heavy sampling of women "road warriors," frequent travelers who hit the road virtually every week of the year. They are the regulars who should be primary marketing targets for smart airlines, hotels, car rental agencies and airports.

The good news coming out of the study is that improvements can be achieved across each category without having to make large investments or to incur radical restructuring. Hoteliers don't need to remodel their properties; airlines do not have to invest in new fleets or reconfigure their aircraft; airports do not have to build new terminals; rental car companies can continue offering the same makes and models. "Attitude is the biggest change that each can make. The cost to do it is nominal compared with what the return on investment in caring will do for their businesses," Brown says.

High marks in the hotel category go to Four Seasons — both in terms of performance and brand quality. The chain frequently was mentioned as having a consistently friendly,

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helpful staff, together with excellent rooms and facilities. Westin, Marriott, Hyatt and Embassy scored reasonably well on brand image, but performance scores were average in terms of customer satisfaction.

U.S. air carriers fared no better than hotels; women business travelers cited a general rudeness and lack of help from staff and most felt that men get preferential treatment on the ground and in the air.

Respondents on both sides of the Atlantic were unanimous in their praise of European carriers, claiming that their service and comfort soar above their U.S. counterparts. They singled out Lufthansa, Virgin, British Airways, Swissair and KLM as superior brands in the service department.

Car renters are not paying too much attention to the special needs of women, according to a massive 91 percent of the sample. And yet, a significant 73 percent of women travelers would be more loyal to car rental agencies that address the needs of women. More than 80 percent are concerned about personal safety when renting a car.

The major problem is picking up a car late at night, or waiting for the shuttle bus to get to the lots where cars are parked. Women also believe men get better treatment, especially on upgrades. Women want cleaner, smoke-free cars and would appreciate more help from staff with luggage, directions, etc.

Hertz has a strong market position among women travelers, as well as high customer satisfaction ratings over Avis and other renters. Performance scores are particularly low for car renters — lower on average than hotels, airlines and airports. They all seem to have one thing in common: Car renters fail to recog-

nize that women have specific needs.

The car companies — as do several brands in the other travel categories — have a higher brand equity compared with their actual performance. Researchers believe this could be dangerous, because the mismatch suggests that car renters are living on their reputations. Eventually, poor performances will dilute the strength of the brand.

Finally, airports are not up to snuff in providing women travelers with the service they want. Security is a major concern, especially when women arrive at an airport late at night. The lack of security staff, particularly when women are waiting for shuttle buses at night, is seen as potentially dangerous.

Assistance with luggage is the second concern. Women frequently have to walk long distances between gates and terminals with luggage, laptops and handbags. Providing a means of helping with this problem is a major way in which airports can better serve the female traveler. American airports rate higher than European, but together they rate low on the scale for customer satisfaction.

No airport was rated as being very good, although verbatim comments suggested that Atlanta and Pittsburgh were better than most. For more information call 609-921-9100.

Gays cite importance of family values

An on-line study of lesbians and gay men conducted by Greenfield Online, Inc., a Westport, Conn., research firm, in partnership with Spare Parts, Inc., a New York marketing and communications company, found that 79 percent agreed with the statement "It is important to me to work in a gay-friendly environment."

The 948 participants told Greenfield Online researchers hundreds of facts about their daily lives. According to the study, lesbians and gay men want to be portrayed as "no different than anybody else." The study found nearly 70 percent agree with the statement "Family values are

important to me." Thirteen percent have children in the household and 17 percent are planning to adopt.

The Internet proved to be an effective way to reach this hard-to-identify segment of society. "Many lesbians and gays prefer not to self-identify for a variety of reasons, but this study has shown dramatically that our community is out of the cyber-closet in large numbers. We now have a way to create an ongoing conversation with an ever broadening pool of people," says Scott Seitz, a managing partner of Spare Parts.

Lesbians and gays say they spend an average of three hours a day on the Internet, excluding e-mail. Some 80 percent own personal computers and 20 percent say they plan to buy one in the next six months.

Although on-line lesbians and gays have an average household income of \$57,300 — just slightly higher than that of the general Internet population — 92 percent lesbians and gays agree that they represent "a powerful economic force." The ninth annual Georgia Tech Graphics, Visualization, & Usability (GVU) Center's World Wide Web annual survey released in July put household income for the general Internet population at \$52,000. GVU generally is accepted as the Internet demographics benchmark.

Unlike some previous research, the study does not assert that the gay community is disproportionately affluent. In fact, the study found all economic levels represented — 47 percent with household incomes under \$45,000 and 31 percent with incomes above \$65,000.

The study validates the importance the gay community places on affinity with companies that are gay-friendly. The study found that 80 percent say they prefer to buy from companies that advertise to the gay market, and 44 percent will buy even if the prices are somewhat higher.

The respondents were 68 percent men, mainly between the ages of 25 and 44, and 32 percent women. Thirty-nine percent are living in a domestic partnership. Eighty-nine per-

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cent have at least some college education, with 23 percent of these having done post-graduate work — making this group better educated than the Internet population in general.

Some lifestyle findings: 55 percent of gay men and 68 percent of lesbians describe themselves as monogamous; 82 percent consider themselves open-minded; 54 percent agree with the statement “I am very settled.”

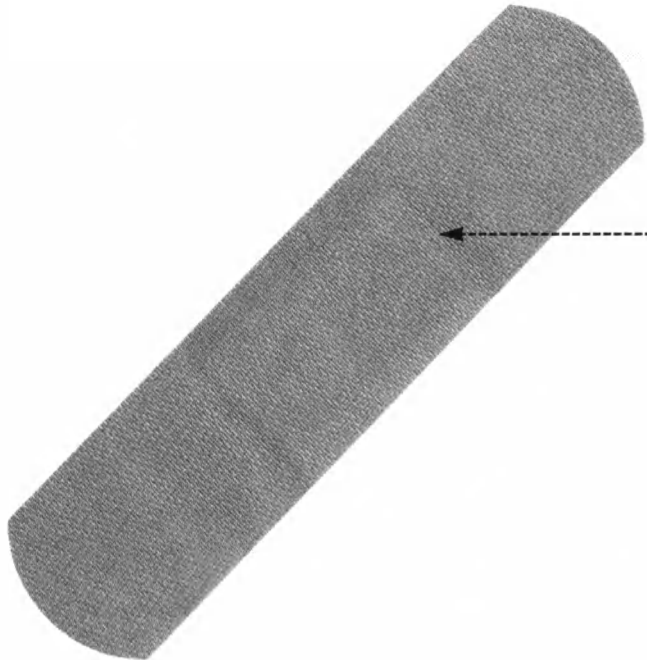
Although 82 percent say they are not politically active, about 90 percent describe themselves as willing to fight for lesbian/gay rights. Ninety-three percent like to see their group shown on television and in movies as “no different than anyone else.”

ABC, the TV network that originated the show *Ellen*, is the most-watched network. Nearly 20 percent describe themselves as couch potatoes.

Buying habits: 58 percent agree with the statement that “I’m part of an unrecognized market that needs to be tapped.” Fifty-six percent say that they plan to travel in the next quarter. Fifty-one percent plan to buy a new car in the next six months, with General Motors cars the likely purchase for 20 percent, Chrysler for 11 percent and Ford for 10 percent. Toyota was named by 7 percent. Forty-nine percent describe themselves as “budget conscious when shopping.” Significantly more gay men are shopping and making purchases on-line than lesbians.

The survey was conducted in July. The survey results have been weighted to represent the Internet population in terms of gender, age, and geographic location. The survey was posted to a password-protected part of the Internet. Greenfield Online oversurveys to make certain a representative sample is obtained. For more information call Spare Parts at 212-988-3488 or Greenfield Online at 203-221-0411 or visit the company’s Web site at www.greenfieldcentral.com.

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Product & Service Update

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gramming environments. For more information call 703-827-7031.

First edition of China sourcebook

Euromonitor has teamed with the China State Statistical Bureau and the Japanese research company Soken to produce a bilingual sourcebook containing official data on the Chinese market. "China Marketing Data and Statistics" is the first edition of what will become an annual publication. The book contains a statistical index of the economic and purchasing strength of each region, including 1,000 market parameters from retailing to tourism to population, ownership of consumer goods, health, education, environment or telecommunications. Also included are an explanation of the terminology and the methodology and analysis of the 30 geographical areas covered. For more information call 800-577-EURO or visit the company's Web site at

www.euromonitor.com.

Web site for BTB direct mailers

Aimed primarily at business-to-business direct mailers, Mardev's new Internet site, www.mardevlists.com, is designed to deliver information to support domestic and international business campaigns by providing a single point of access to assist campaign decision making. The site includes information on new data protection laws in Europe, the latest direct marketing articles, tips and best practices. The site also offers ListSearch, an interactive guide to Mardev's portfolio of 300 international business, academic and scientific lists. Mardev is the list management division of publishing firm Reed Elsevier.

Pulse Train updates

Pulsar

U.K.-based Pulse Train Technology has released Pulsar 2.2, an upgrade to its desktop analysis package. The main

enhancement is that the software now allows the user to analyze hierarchical data, stored either in a relational database or in flat ASCII format. Other new features include a new batch printing capability — allowing the user to select a number of tables, charts, and reports from a project for printing — and the ability to export profile reports, containing selected areas of data, to the statistical analysis software SAS. For more information call Hank Copeland at 561-842-4000 or visit the company's Web site at www.pttsystems.com.

Survey shows companies how they're viewed on the Street

Sharon Merrill Associates (SMA), a Boston corporate communications firm, has introduced its StreetScope Investor Relations Benchmarking Survey. StreetScope is a customized perception audit that informs public companies of how they are viewed by Wall Street. The service typically consists of a customized survey as well as a report on key findings, strategic recommendations and verbatim comments. The research is conducted by an SMA team that includes a senior-level investor relations professional and the company's research staff. For more information call 617-542-5300 or visit the company's Web site at www.sharonmerrillassoc.com.

NDS releases Net-based site analysis tool

National Decision Systems, San Diego, has released imark for Internet-based market, site, and customer analysis. Imark combines demographic, consumer demand and business data with a company's own proprietary information (inventory, sales, customer, competition, etc.) to allow it to identify and evaluate potential site locations; quantify product demand, traffic volumes, and competitor influence; ascertain customer lifestyles and trends; make marketing and merchandising decisions on a local or regional basis. For more information call 800-866-6520 or visit the company's Web site at www.natdecsys.com.

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Data Use

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the true population number? A typical answer may be, "The population number is within ± 3 percent of the sample estimate." Naturally, the smaller the sampling error

expressed in terms of standard deviation. I list below three widely acceptable levels of confidence, and their standard-deviation counterparts:

1. 68 percent confidence level — The population number is within plus or minus one standard deviation of my sample estimate.

2. 95 percent confidence level — plus or minus two standard deviations. It is the most popular level.

3. 99.7 percent (almost 100 percent) confidence level — three standard deviations.

Now, let's substitute all the known quantities into the size calculation formula to solve for N:

$$0.4770 = \text{sq. rt. of } [0.35 \times (1 - 0.35)]$$

$$0.015 = 0.03/2$$

$$N = (0.4770/0.015) ** 2 = 1,011$$

Therefore, the required survey sample size is 1,011, for a 95 percent confidence level and a tight error bound of ± 3 percent. Exhibit 1 shows the calculated sample sizes under various levels of sampling

error rates and estimated "yes" percentages, all at 95 per-

Exhibit 1:

Typical Sample Size Table by Simple Random Sampling, at 95% Confidence Level and Dichotomous Responses

Sample estimate of "yes" responses	Population parameter in interval: [sample percent estimate (\pm)X%] Range of Error X%												
	1%	2%	3%	4%	5%	6%	7%	8%	9%	10%	15%	20%	
5%	1,900	475	212	119	76	53	39	30	24	19	9	5	
10%	3,600	900	400	225	144	100	74	57	45	36	16	9	
15%	5,100	1,275	567	319	204	142	105	80	63	51	23	13	
20%	6,400	1,600	712	400	256	178	131	100	80	64	29	16	
25%	7,500	1,875	834	469	300	209	154	118	93	75	34	19	
30%	8,400	2,100	934	525	336	234	172	132	104	84	38	21	
35%	9,100	2,275	1,012	569	364	253	186	143	113	91	41	23	
40%	9,600	2,400	1,067	600	384	267	196	150	119	96	43	24	
45%	9,900	2,475	1,100	619	396	275	203	155	123	99	44	25	
50%	10,000	2,500	1,112	625	400	278	205	157	124	100	45	25	

you want, the larger the sample size you will need.

- **Level of confidence:** How confident are you about your one-sample estimate in repeating itself through repeated samples? An answer may be, "I am 95 percent confident that the population number is between A and B." The larger the confidence level you want, the larger the sample size you will need.

The sample size should be determined before other survey considerations such as: what questions you should ask; what response rate you can expect: how to or who should collect the data. There are two ways to approach the sample-size problems: 1) You have already decided on the confidence level and the sampling error requirements, now you want to know the sample size; 2) You have decided on the sample size and the confidence level required, now you want to know the error rate of your sample estimate.

To solve Problem One for the sample size, I begin by assuming the following, rather limited, conditions:

- All my survey questions have the yes/no type of dichotomous answers.
- My absolute error-rate (E) requirement is 3 percent. (The true population number is within the range of ± 3 percent of my sample estimate.)
- My confidence level (C) requirement is 95 percent. (I want to be sure that my population number estimated from one sample can be repeated 95 times out of 100 samples.)
- My first guess at the percentage estimate for the "yes" answer in my sample for a particular question (P) is 35 percent.

The sample size (N) calculation formula is simply:

$$N = \text{square of } \{ \text{square root of } [P \times (1-P)] / (E/\text{std}(C)) \},$$

where "std(C)" is the equivalent of confidence level,

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cent confidence level by simple random sampling.

To solve for Problem Two for the error rate, I have already been given a sample size, say, 1,011 (N), and the confidence level, say, 95 percent (C). Using the same formula, converting the confidence level (C) into an appropriate standard deviation, $\text{std}(C)$, and assuming that my sample percentage of the "yes" answer (P) is 35 percent, my sampling error rate will again be calculated as ± 3 percent. Remember that increased sample size generally means increased survey reliability, which must be traded

off with increased cost and time. (done somewhat subjectively) because:

$$0.50 = \text{Sq. rt. of } [0.50 \times (1-0.50)]$$

$$31.7980 = \text{Sq. rt. of } 1,011$$

$$E = 0.50 / 31.7980 \times 2 = 0.03145 \text{ (or, 3.145\%)}$$

Finally, I may want to enlarge the calculated sample size

Exhibit 2:

**Typical Sampling Error Table by Simple Random Sampling,
at 95% Confidence Level and Dichotomous Responses (Range of error in %)**

Sample estimate of "yes" responses	Sample size															
	100	200	300	400	500	600	800	1,000	1,200	1,500	2,000	2,500	3,000	4,000	5,000	
5%	4.4	3.1	2.5	2.2	2.0	1.8	1.5	1.4	1.3	1.1	0.96	0.87	0.79	0.69	0.62	
10%	6.0	4.3	3.5	3.0	2.7	2.5	2.1	1.9	1.7	1.6	1.3	1.2	1.1	0.95	0.85	
15%	7.1	5.1	4.1	3.6	3.2	2.9	2.5	2.3	2.1	1.9	1.6	1.4	1.3	1.1	1.0	
20%	8.0	5.7	4.6	4.0	3.6	3.3	2.8	2.5	2.3	2.1	1.8	1.6	1.4	1.3	1.1	
25%	8.7	6.1	5.0	4.3	3.9	3.6	3.0	2.8	2.5	2.3	1.9	1.7	1.6	1.4	1.2	
30%	9.2	6.5	5.3	4.6	4.1	3.8	3.2	2.9	2.7	2.4	2.0	1.8	1.7	1.4	1.3	
35%	9.5	6.8	5.5	4.8	4.3	3.9	3.3	3.1	2.8	2.5	2.1	1.9	1.7	1.5	1.4	
40%	9.8	7.0	5.7	4.9	4.4	4.0	3.4	3.1	2.8	2.5	2.2	2.0	1.8	1.5	1.4	
45%	9.9	7.0	5.8	5.0	4.5	4.1	3.5	3.2	2.9	2.6	2.2	2.0	1.8	1.6	1.4	
50%	10.0	7.1	5.8	5.0	4.5	4.1	3.5	3.2	2.9	2.6	2.2	2.0	1.8	1.6	1.4	

off with increased cost and time.

Exhibit 2 shows the calculated sampling errors under various sample sizes and estimated "yes" percentages, all at 95 percent confidence level by simple random sampling.

Notice also that when $P=0.5$, or 50 percent, the value of $[P \times (1-P)]$ is at the maximum. What this implies is that, the more unsure I am about the survey outcome (i.e., the percentage estimate for the "yes" answer, P, would be close to 50 percent — I am only certain half the time), the larger the sampling error will be.

Going back to the Problem Two scenario, and changing my sample estimate for the "yes" percentage from the ear-

(done somewhat subjectively) because:

1. My survey contains questions with multinomial answers. In such a case, I will pick the question with the highest number of answer categories to estimate my sample size. The resulting size should be good for the entire survey.

2. I have to take into consideration the non-response rate.

3. I want to ensure that when I crosstabulate one variable with another, I would have enough data in each cell.

If you are interested in obtaining a spreadsheet-based sample size calculator, please e-mail me at ss@clearview-data.com. ☺

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Sonic

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cities. "We believe it's best to use local shoppers whenever possible so that the shop is as realistic as we can make it," adds Goldsmith.

Sonic shops each store a minimum of once a month. Included in the more than 50 questions on their custom developed evaluation form are: Did the carhop check back with you and offer additional service after the food was delivered? Was the switchboard greeting warm and friendly? Was music audible from outside speakers?

Once the store is shopped, the evaluation form is sent overnight to Maritz operations in Kansas City. Responses and comments go through editing in the field office and then a final quality check at its St. Louis headquarters. As an extra quality measure, in addition to the written report, each shopper phones Kansas City for a debriefing.

"Technology is an important con-


sideration in our mystery shopping program. Because turnaround is so critical, it is important to have a computer system that allows rapid compilation and reporting of shopping data," says Abernathy.

At the end of each month, Maritz transmits a data file, including all of the completed shops for the month, to Sonic's ad agency. The agency then produces a variety of reports for

drive-in, the supervising partners/principal partners and the directors within three business days. In the event of a shop question or concern, Maritz maintains a toll-free hot line exclusively for use by Sonic management.

Successful on many fronts

For Sonic, mystery shopping has been a success on a number of fronts. Participation in the Sonic Games has grown each year. Mystery shopping scores are now being used for regional incentives as well as the Sonic Games. Sonic's recent research shows that mystery shop scores from drive-ins participating in the games are higher than non-participating drive-ins.

And for Troy Evans, who has been promoted to crew chief, coming home with a Gold Medal has reinforced his commitment to providing quality service. 



Sonic. In addition, shop results are input into the database and delivered to Sonic headquarters via e-mail. Copies of the reports are sent to the

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Many uses

continued from p. 23

or anything else you can dream up!

Closely tied to recognition programs are incentive programs. Customer service evaluations, a.k.a. mystery shopping reports, are often a part of the formula that makes up an employee's (particularly a manager's) bonus. Sometimes they are part of contests, pitting stores or regions against one another to determine who can achieve the best scores for customer service.

One caveat we always stress, however, is that the information relayed on an evaluation is not to be used as the sole basis of individual performance appraisals.

- Measuring training. The most common use of mystery shopping is to measure training. We recommend a program done in three phases.

In phase one, shoppers are sent in to evaluate the existing level of customer service. This provides a

benchmark, a place to start assessing what areas need to be addressed in a training program as well as what areas are going well and need to be reinforced.


In phase two, the evaluations are analyzed and a training program is developed, based on identified weaknesses and company standards. The training program is implemented, either company-wide or as a test in a targeted location or region.

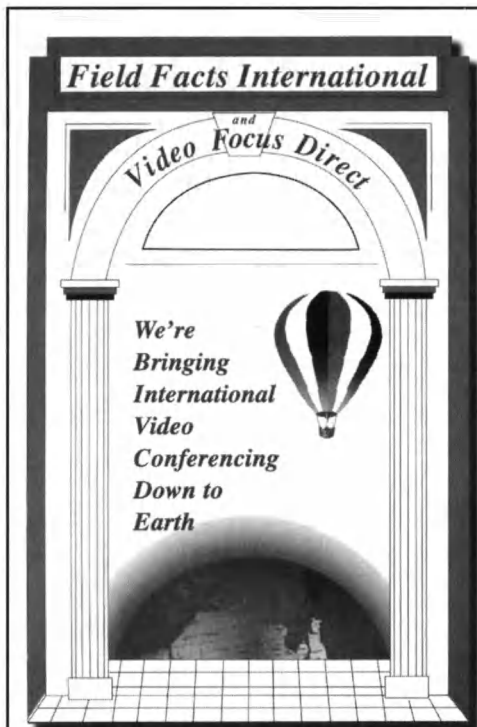
In phase three, shoppers return to evaluate the customer service post-training. In this way, a measure can be taken of the effectiveness of the training program, using a custom-designed evaluation form developed to highlight the areas in which training took place.

Areas of continuing weakness can be addressed and trainers can determine what techniques worked well in getting the message across to employees and which didn't. Over a period of several months — or longer — continued improvement in specif-

ic areas can be documented, as can areas of persistent weakness.

A well thought-out, properly managed mystery shopping program provides important feedback about the effectiveness of employee selection and training. The knowledge, on the part of employees, that a store is being shopped can also heighten customer service awareness and thereby upgrade service. In addition, establishing and monitoring standards is usually well received by employees. Such directives tend to eliminate confusion on the part of employees and increase motivation.

Ongoing training and assessment are key to achieving the type of high-level customer service that commands customer loyalty — and repeat business. Mystery shopping can play an important role in determining the customer service your employees are giving — and what they are capable of once the proper training is provided. 



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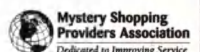
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Fax 508-655-0096
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Fax 310-645-1922
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Oxford OX1 1JD
United Kingdom
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E-mail: c.white@nopres.co.uk
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Fax 405-752-2344
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Memphis, TN 38115
Ph. 901-362-0509
Fax 901-362-0896
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Fax 770-919-1359
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 Fax 972-394-9561
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(See advertisement on p. 81)

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The Question Shop, Inc.
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Orange, CA 92667
Ph. 714-974-8020 or 800-411-7550
Fax 714-974-6968
Ryan Reasor, President
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Fax 561-748-3601
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 Fax 734-741-8148
 E-mail: jeffh@second-to-none.com
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Secret ShopNET
 ECom Communications Corp.
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 Fax 403-261-4999
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Robert Seiler, Managing Director
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Fax 770-887-1949
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(See advertisement on p. 85)

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(See advertisement on p. 85)

Shop'n Chek S.A. de C.V.
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Mexico City, DF 03100
Mexico
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Fax 52-5-543-7548
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(See advertisement on p. 85)

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(See advertisement on p. 85)

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Fax 407-323-5217
E-mail: mba@iag.net
Marilyn Whelan, President
Internationally - Full service
B, E, F, H, R, RT, S

Shoppers' View
960 Scribner Ave. N.W.
Grand Rapids, MI 49504
Ph. 616-356-2588
Fax 610-356-2589
E-mail: mystshop@grgig.com
www.shoppersview.com
Steve Leach
Nationally - Full service
B, E, F, R, RT, S



SHOPPERS, Inc.
119 S. First
Broken Arrow, OK 74012
Ph. 800-259-8551
Fax 918-251-0606
E-mail: rkshook@galstar.com
Kathy Shook, President
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Shoppers, Inc., a certified minority firm, has been providing mystery shoppers and related services nationwide since 1986. The firm features competitive prices, custom designed programs, thorough management reporting of statistics and guaranteed satisfaction. Services

include mystery shoppers, comment cards/surveys, telephone review, competitive shops, loss prevention, security and investigation services. (See advertisement on p. 84)



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 A. Portinga, General Manager
Nationally - Full service
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Nationwide mystery shopping company with 10 years of experience in retail, hospitality, grocery, automotive, casino and other fields. We can help you verify operational procedures, check service standards and measure guest satisfaction. Flexible custom formats measure your areas of focus. Database and e-mail reporting available. (See advertisement on p. 84)

Marion Simon Research Service, Inc.
49 Wildbriar Rd.
Rochester, NY 14623
Ph. 716-359-1510
Fax 716-334-9423
E-mail: Msrdc@aol.com
Marion Simon, President
Regionally - data collection/Field service
B, E, F, H, R, RT, S



Sinclair Service Assessments, Inc.
10715 Gulfdale, Ste. 140
San Antonio, TX 78216-3633
Ph. 210-979-6000 or 800-880-3111
Fax 210-979-6677
E-mail: info@sinclair.com
www.sinclair.org
Robert Sinclair Jr., President
Nationally - Full service
B, E, F, R, RT

Specializing in state-of-the-art mystery shopper programs since 1987, SSA provides mystery shopping services throughout the U.S. and abroad. Using the latest information systems technologies, SSA can make service measurement part of your company's daily operation. If you don't measure it, you can't manage it. (See advertisement on p. 31)

SMI
15375 Barranca Pkwy., Bldg. A
Irvine, CA 92618
Ph. 949-727-7411
Fax 949-727-0516
E-mail: SteveS@supermarketing.com
Steven Stocks, V.P. Sales & Mktg.
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E, R

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a certified minority enterprise, since 1986

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Indianapolis, IN 46225
Ph. 317-822-0778
Fax 317-822-0970
E-mail: smcorpmail@aol.com
Karen D. Smith, President
Regionally - Full service
B, R, RT, S

Sonoma Research, Inc.
P.O. Box 4877
Santa Fe, NM 87502
Ph. 505-992-0474
Fax 505-992-0462
E-mail: zephyrp@earthlink.net
Sally Neilson, Dir. Client Svcs.
Regionally - Data collection/Field service
E, F, R, RT, S

SPAR/Burgoyne Retail Services, Inc.
Ehrhart-Babic/NRTI (Nat'l. Retail Tracking Index)
Div.
14 Industrial Ave.
Mahwah, NJ 07430
Ph. 201-934-0600
Fax 201-934-3935
E-mail: tbacon@sparinc.com
www.sparinc.com/
Tracy Bacon, Vice President
Nationally - Full service
E, F, R, RT

Stewart International Associates
838 Cherry St.
P.O. Box 222
Winnetka, IL 60093-0222
Ph. 847-501-3647 or 414-964-8876
William W. Redemann, President
Nationally - Full service
B, F, R, S

Strategic Marketing Services
5 Milk St.
Portland, ME 04101
Ph. 207-774-6738
Fax 207-772-4842
E-mail: pmurphy@maine.rr.com
Regionally - Full service
B, E, F, H, R, RT, S

Strategic Marketing Solutions
P.O. Box 25938
Colorado Springs, CO 80936
Ph. 719-594-6428
Fax 719-262-0383
E-mail: lizahaight@aol.com
Locally - Data collection/Field service
B, E, F, H, R, RT, S

Suburban Associates
579 Franklin Tpke.
Ridgewood, NJ 07450
Ph. 201-447-5100
Fax 201-447-9536
E-mail: info@subassoc.com
www.subassoc.com
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why we're the leader in mystery shopping research



1 Quality Programs.

Shop'n Chek has been dedicated to providing the highest quality programs in the industry since 1973. Our services include customer service evaluation, product presentation and incentive programs as well as pricing studies. Read about us in *The Service Edge* and *Keeping the Edge*.

2 Technological Innovation.

Ask about *Xpress Reporting*[®], a technologically advanced mystery shopping data acquisition program that provides you with the most accurate data in the most timely manner possible. Additionally, Shop'n Chek uses a variety of Internet technologies to make completed reports and aggregate data more accessible to you.

3 Global Reach.

Our network and our commitment to provide the highest quality programs and data extend throughout the U.S., Canada, Europe, Latin America, the Pacific Rim and the Caribbean with over 90,000 mystery shoppers worldwide.



Contact us at: **1.800.669.9939**
or via e-mail at: **sales@shopnchek.com**

www.shopnchek.com

Codes

B - Business/Industry
 E - Entertainment
 F - Financial Services
 H - Health Care
 R - Restaurant/Fast Food
 RT - Retail
 S - Services

Surveys Unlimited, Inc.
 232 Vincent Dr.
 East Meadow, NY 11554
 Ph. 516-794-5650
 Fax 516-794-3841
 E-mail: NYSURVEYS@aol.com
 http://members.aol.com/nysurveys
 Gladys Ronco, President
 Regionally - Data collection/Field service
 B, E, F, H, R, RT, S

Tenox Appraisal Systems
 One City Centre Dr., Ste. 310
 Mississauga, ON L5B 1M2
 Canada
 Ph. 905-848-8288
 Fax 905-848-1438
 E-mail: tenox@weshop4u.com
 Sean Cavanagh, Vice President
 Internationally - Full service
 B, E, F, R, RT, S

TWM Research Group, Inc.
 2 Riverchase Office Plaza, Ste. 210
 Birmingham, AL 35244
 Ph. 205-987-8037
 Fax 205-987-8195
 Glenda Terrell, President
 Locally - Full service
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Utah Market Research Services
 Div. of Ruth Nelson Research
 Crossroads Plaza Mall
 50 S. Main St.
 Salt Lake City, UT 84144-0103
 Ph. 801-363-8726
 Fax 801-321-4904
 E-mail: rncmrs@aol.com
 www.ruthnelsonresearchsvcs.com
 Ruth Nelson, President
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WAC of New York
 60 Madison Ave., 5th fl.
 New York, NY 10010-1600
 Ph. 212-725-8840
 Fax 212-213-9247
 E-mail: WACInc@aol.com
 www.wacresearch.com
 Dr. James Frisch
 Regionally - Full service
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The Waveland Group
 5240 St. Charles Rd.
 Berkeley, IL 60163
 Ph. 708-449-2495
 Fax 708-449-2503
 Pam Hickey, Sr. Director
 Nationally - Full service
 S

WestGroup Research
 2720 E. Thomas, Bldg. A
 Phoenix, AZ 85016
 Ph. 602-707-0050 or 800-999-1200
 Fax 602-707-0055
 E-mail: askarizona@westgroupresearch.com
 www.westgroupresearch.com
 Beth Aguirre, Project Director
 Nationally - Full service
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Margaret Yarbrough & Associates
 934 Shorepoint Ct., Ste. 100
 Alameda, CA 94501
 Ph. 510-521-6900
 Fax 510-521-2130
 E-mail: marge@hooked.net
 www.hook.net/users/marge
 Regionally - Data collection/Field service
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Yee/Minard & Associates, Inc.
 27300 W. 11 Mile Rd., Ste 500
 Southfield, MI 48034
 Ph. 248-352-3300
 Fax 248-352-3787
 E-mail: ymanew@aol.com
 Anne Scott-Montgomery
 Locally - Data collection/Field service
 E, F, R, RT, S

Sally E. Zorich & Associates
 819 Ashland Ave.
 St. Paul, MN 55104
 Ph. 651-290-2564
 Fax 651-290-2564
 E-mail: SalZorich@aol.com
 Sally Zorich, Owner
 Locally - Data collection/Field service
 B, E, F, H, R, RT, S

International Mystery Shopping

These firms conduct mystery shopping on an international basis.

Audits & Surveys Worldwide

Automotive Insight, Inc.
 Bare Associates International, Inc.
Barry Leeds & Associates, Inc.
 Beyond Hello Inc.
 Capstone Research, Inc.
 Cascade Strategies, Inc.
 Certified Reports, Inc.
 Danis Research
DSG Associates, Inc.
E & L Marketing Research
 Feedback Plus, Inc.
 Green & Associates
 HR and Associates, Inc.
 Stanford Klapper Associates, Inc. (Puerto Rico)
 Market Image
 Market Trends, Inc.
 Marketing Solutions Corporation
Michelson & Associates, Inc.
 NOP Mystery Shopping (United Kingdom)
 Pinkerton Shopping Services
 Product Research and Development
 Bernadette Schleis & Associates, Inc.

Second To None, Inc.
 Secret ShopNET (Canada)
 Sensors Quality Management, Inc. (Canada)
 Service Dimensions International (Canada)
Shop'n Chek, Inc.
 Shoppers International, Inc.
SHOPPERS, Inc.
 Tenox Appraisal Systems (Canada)

National Mystery Shopping

These firms conduct mystery shopping on a nationwide basis. See also International Mystery Shopping.

United States

A Closer Look
 A One Research, Inc.
 American Public Opinion Survey &
Anonymous Insights, Inc.
 Bartels Research Corp.
BestMark
 Better Marketing Associates, Inc.
 Business Evaluation Services
 Business Research, Inc.
 Car-Lene Research, Inc.
 CB & A Market Research
 Check Mark, Inc.
Commercial Service Systems, Inc.
Confero, Inc.
 The Consumer Research Network, Inc.
 Cross Financial Group
 Customer 1st
 Customer Perspectives
 Customerize Consulting
 Cutting Edge Research, Inc.
 Decision Services Corp. of America
 Defensive Business Management
 Eagle Research - Atlanta
 Eagle Research - Denver
 Friedman Marketing Services
 Galli Research Services
Genesis Group, Inc.
 IMAGES Market Research
 Integrated Research Associates, Inc.
 Rickie Kruh Research
 The KTR Group, Inc.
 Leibowitz/Roher Marketing, Inc.
 The Locksley Group, Ltd.
Maritz Marketing Research Inc.
 Market Dynamics Research Group
 Market Insights, Inc.
 Market Monitor, Inc./Service Monitor
 Market Trends Pacific, Inc.
 Market Viewpoint
 McGladrey & Pullen, LLP
 Meyers Research Center
MPS Research, Inc.
 Mystery Guest, Inc.
 Mystery Shoppers Inc.
 Mystery Shoppers, Inc.
 Mystery Shopping, Inc.
 National Field & Focus, Inc.
 National Shopping Service
 National Shopping Service Network, LLC
 Pat Henry Market Research, Inc.

Perceptive Market Research, Inc.

The Performance Group (PGI Research)

Prove of Orlando, Inc.

Public Insights, Inc.

Quality Assessments Mystery Shoppers, Inc.

Quality Check

Quality Controlled Services

QualityWorks Associates

The Quest for Best Mystery Shoppers

Quick Test

The Retail Advantage, LLC

Retail Diagnostics, Inc.

Schlesinger Associates, Inc.

Service Alliance, Inc.

Service Evaluation Concepts, Inc. (SEC)

Service Excellence Group, Inc.

Service Performance Group

Service Research Corp.

ServiceTRAC, Inc.

SG Marketing Group

Shoppers' View

Sights On Service, Inc.

Sinclair Service Assessments, Inc.

SMI

SPAR/Burgoyne Retail Services, Inc.

Stewart International Associates

The Waveland Group

WestGroup Research

Argentina

ASECOM Latin America

Australia

Shop'n Chek, Australia Ltd.

Canada

Contemporary Research Centre

R.I.S. Christie - The Data Collection Co.

China (Hong Kong)

The AMI Group of Companies

Greece

Market Analysis Ltd.

Guam

Market Research & Development, Inc.

Mexico

Shop'n Chek S.A. de C.V.

Philippines

Shop'n Chek, Philippines

United Kingdom

Shop'n Chek Europe LTD

Regional Mystery Shopping

These firms conduct mystery shopping on a regional basis. They have been organized by state for your convenience. See also National and International Mystery Shopping.

Alabama

Connections, Inc.

Graham & Associates, Inc.

New South Research

Arizona

Arizona Market Research Services

Maidman Field Services

California

Decision Research

Elliott Benson

Jordan Associates

Kiyomura-Ishimoto Associates

L.A. Research, Inc.

Opinions of Sacramento

The Question Shop, Inc.

Margaret Yarbrough & Associates

Colorado

Colorado Market Research Services

Connecticut

Beta One, Inc.

Shapiro Research Services, Inc.

Delaware

Keystone Marketing Research

Florida

A.I.M. Field Service

Creative Product Marketing

Kirk Research Services, Inc.

Mar's Surveys

Mar's Surveys of Orlando

Professional Research Group

Georgia

Beisner Research Associates

Highsmith-Charnock Interviewing Service, Inc.

P V R, Inc.

The Shadow Shopper of Georgia, Inc.

Illinois

C R Market Surveys

Horizon Field Service, Inc.

Marketing Advantage Research Consultants, Inc.

Indiana

Herron Associates, Inc.

Smithmark Corporation

Iowa

Mid-Iowa Interviewing, Inc.

PMR-Personal Marketing Research, Inc.

Rosow Interviewing

Louisiana

The Field Force, Inc.

Maine

Strategic Marketing Services

Maryland

Bay Area Research

Kane-Benson & Co., Inc.

Michigan

Crimmins & Forman Market Research

IntroMarketing

Minnesota

At Your Service!

Mississippi

Emerson Research Services

Missouri

Carol Max Marketing Services, Inc.

Nevada

Consumer Research Center

Las Vegas Surveys, Inc.

New Hampshire

New England Interviewing, Inc.

New Jersey

Frances Bauman Associates

Suburban Associates

New Mexico

Sonoma Research, Inc.

New York

A & B Interviewing, Inc.

C.B. DuPree Associates

Q M S

Quest Marketing Group

Marion Simon Research Service, Inc.

Surveys Unlimited, Inc.

WAC of New York

North Carolina

Free Lance Services

Codes

B - Business/Industry
 E - Entertainment
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 H - Health Care
 R - Restaurant/Fast Food
 RT - Retail
 S - Services

Ohio

Market Tasks, Inc.

Oklahoma

Customer Connection, Inc.
 Higbee & Associates, Inc.
 Oklahoma City Research

Oregon

Gilmore Research Group

Pennsylvania

Pittsburgh Phone & Focus, Inc.

South Carolina

Low Country Marketing, Inc.
 Midlands Market Research

Tennessee

Mellon Market Research
 People Plus

Texas

Donley Market Research
 Hispanic Focus Unlimited
 Houston Certified Research
 Mar's Surveys of Texas
 Merchandising Specialists
 Mystery Shopping Network

Utah

Utah Market Research Services

Vermont

Action Research

Washington

Gilmore Research Group

West Virginia

McMillion Research Service

Wisconsin

Field Surveys & Audits of Milwaukee
 Millie Sevedge & Associates

Local Mystery Shopping

These firms conduct mystery shopping on a local basis. They have been organized by metropolitan area for your convenience. See also Regional, National and International Mystery Shopping.

Baltimore, MD

Mystic Marketing

Birmingham, AL

TWM Research Group, Inc.

Boston, MA

Performance Plus

Chicago, IL

Accurate Data Marketing, Inc.
 Chicago Focus
 Focuscope, Inc.
 Precision Research, Inc.

Hong Kong, China

The AMI Group of Companies

Cincinnati, OH

Assistance in Marketing, Inc.

Cleveland, OH

Focus Groups of Cleveland Survey Center
 Rosen Research

Colorado Springs, CO

Strategic Marketing Solutions

Dallas/Ft. Worth, TX

Donley Advertising & Media Research
 Fenton Swanger Consumer Research, Inc.

Detroit, MI

Yee/Minard & Associates, Inc.

Houston, TX

M.A.T. On-Site Research

Las Vegas, NV

MRCFocus

Memphis, TN

PWI Research

Milwaukee, WI

Lein/Spiegelhoff, Inc.
 Mazur/Zachow, Inc.

**Minneapolis/
St. Paul, MN**

Jeanne Drew Surveys
 Sally E. Zorich & Associates

**Newport News/Norfolk/
Virginia Beach, VA**

Marketrends, Inc.

Omaha, NE

Midwest Survey & Research

Orlando, FL

About Orlando Market Research

**Philadelphia, PA/
Southern NJ**

JRP Marketing Research Services
 Liberty Research Services, LLC

Raleigh/Durham, NC

Alar Market Research, Inc.

St. Louis, MO

Consumer Opinion Council Research Center

San Diego, CA

San Diego Surveys, Inc.

Shreveport, LA

DCW Interviewing Service

Tampa/**St. Petersburg, FL**

Bordner Research, Inc.

Washington, DC

OMR (Olchak Market Research)

West Palm Beach FL

Cynthia Deutsch Interviewing

Wilmington, DE

Delaware Research Co.
 Seek Research

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Marketing Research Review, 8030 Cedar
Avenue South, Suite 229, Minneapolis, MN
55425. Phone 612-854-5101. Fax 612-854-
8191. E-Mail: evanqmrr@mn.uswest.net.

West Coast: Lane Weiss, Lane Weiss &
Associates, 10 Black Log Road, Kentfield,
CA, 94904. Phone 415-461-1404. Fax 415-
461-9555.

Listing Additions

Please add the following firms to the 1999 Directory of Focus
Group Facilities:

NFS Market Research Pty Ltd.

GROUP ROOMS
15/71 Bradley Street
Spring Hill, QLD 4000
Australia

Ph. 61-7-3839-9588
Fax 61-7-3839-5070

Location: Office building

CR, LR, OR, 1/1, 1/10R, VE

15x10 Obs. Rm. Seats 6

12x9 Obs. Rm. Seats 4

Living-room style room

12x9 Obs. Rm. Seats 4

INNER Strategic Market Research

C/Velazquez 109, 6 dcha
28006 Madrid

Spain

Ph. 34-91-563-11-28

Fax 34-91-562-68-13

E-mail: inner@stnet.es

www.stnet.es/inner

Enrique Domingo de Blas

Location: Office building

CR, LR, OR, 1/1, VE, VC

1998 QMRR Story Index

Case Histories

January

Mystery shopping: "Extending excellence — Mystery shops help Bose make sure its customer service matches its reputation for quality"

February

Qualitative/quantitative research: "Minting a new Mint — Charlotte art museum uses research to light path into 21st century"

March

Advertising research: "The big picture — Consumers tell Maryland Lottery what it really means to hit the jackpot"

Advertising research: "It's about time — Research leads Nebraska health network to focus on speed of service in its ads"

April

Business-to-business research: "Giving business a lift — One-on-ones help manufacturing firm understand customer concerns"

May

Customer satisfaction: "High marks — Dining customers use scannable forms to tell ARAMARK how it can improve"

June

Health care research: "Toward a better diagnosis — Pfizer conducts research with doctors to improve usability of men's health inventory"

Health care research: "How far is too far? — Hospital system uses a time and distance analysis to plan for inpatient obstetric services"

July

Internet research: "Turning to a virtual campus for a real education — Penn State University conducts multi-level research to launch its on-line campus"

Internet research: "On the front line of on-line — Snapshots of three firms' on-line research experience"

October

Customer satisfaction: "A strong connection — GTE Internetworking boosts satisfaction numbers through a customer-focused approach and an organization-wide commitment"

November

International research: "Agricultural research in Asia — One acre, one farmer, 1,000 problems"

December

Qualitative research: "Forming a new covenant — Focus groups guide creation of a new identity for Michigan health care system"

Technique Discussions

January

Mystery shopping: "Constructing an effective mystery shopping program"

Mystery shopping: "Putting a positive spin on mystery shopping"

Mystery shopping: "An established shopper program can be the answer for customer service management"

Mystery shopping: "Using mystery shopping for discrimination and sales practices monitoring"

Mystery shopping: "High-tech mystery shopping: using audio and video shopping effectively"

Employee research: "Companies should view employee research as an investment rather than an expense"

Data analysis: "Interpreting research data: It all depends on the context"

Focus group moderating: "Diary of a moderator — part II: On the road again"

February

Brand equity: "Linking a brand's equity to its identity"

The business of research: "Finding and retaining research staff: a perspective"

New product research: "Getting the most from new product research"

Ethnic research: "Trends in Hispanic research"

International research: "Surveying international markets demands special attention"

Employee research: "Creativity is lurking inside your company: Do you know how to find it?"

Mapping: "Maps add value to research"

March

Advertising research: "Oh, we of little faith — Advertising works, believe it or not"

Advertising research: "Predicting the sales effectiveness of advertising"

Advertising research: "How super are supermodels as advertising spokeswomen?"

Advertising research: "Can we really measure creativity?"

The business of research: "Ten research industry secrets and how to handle them"

The business of research: "QMRR roundtable finds research in flux"

April

Business-to-business research: "Issues in business-to-business qualitative"

Business-to-business research: "Segmenting complex business-to-business markets"

Ethnic research: "Hispanic buying power"

Ethnic research/health care research: "Understanding minority health needs through focus groups and cluster sampling techniques"

Ethnic research: "Acculturation: conceptualization and measurement"

Ethnic research: "Kwanzaa and its marketing implications"

Ethnic research: "Simultaneous interpretation in qualitative research"

May

Telephone research: "Why I love predictive dialers"

Telephone research: "Digital audio gives a real 'voice' to respondents"

Telephone research: "Designing effective telephone interviews: objectives in the script development process"

Telephone research: "CATI systems: Should you lease or buy?"

The business of research: "Outsource it or keep it in-house?"

Conjoint analysis/new product research: "Using virtual reality-based conjoint to capture the voice of the customer"

Qualitative research: "Beyond human oddities: how to mine consumer brains to build powerful brands"

Television research: "Research about nothing: Is Kramer master of Jerry's domain?"

June

Health care research: "Rx DTC advertising: a delicate balance"
Tracking research: "Strategic marketing tracking"
Viewpoints: "Research should be integrated and lead to strategic decision-making"
Viewpoints: "The words of marketing research"

July

Internet research: "The top 10 FAQs about on-line research"
Internet research: "Conducting full-profile conjoint analysis over the Internet"
Internet research: "Internet surveys: a description of the demographics"
Internet research: "On-line research: playing to the Web's strengths"
Internet research: "Effective use of on-line research"
Internet research: "The future of research is on-line"
Internet research: "Internet focus groups are not focus groups — so don't call them that"
Internet research: "The 10 commandments of electronic market research"
Qualitative research: "Using qualitative research to improve corporate intranet sites"
Internet research: "Measuring and improving Web site design — case histories and insights"

October

Customer satisfaction: "An alternative method of reporting customer satisfaction scores"
Customer satisfaction: "Customer satisfaction: fad or fundamental management practice?"
Customer satisfaction: "Assessing the impact of study design and other factors on determinations of health plan satisfaction drivers"
Customer satisfaction: "Satisfaction research can help technology companies thrive, not just survive"
Customer satisfaction: "Improving customer loyalty through a strategic value-focused approach"
Customer satisfaction: "Powering your way to reduced customer churn and increased customer loyalty"
Customer satisfaction: "Create a collaborative service culture in your call center"
Customer satisfaction: "Assessing customer requirements: the Kano method"

November

International research: "An insider's guide to conducting effective research in developing countries"
International research: "Yes, you can! Tips on conducting research in Latin America"
International research: "Emerging trends in China's marketing research industry — 1998"
International research: "Telephone research in Asia — the wave of the future?"
International research: "International focus groups: Embrace the unpredictable"
International research: "An international marketing research checklist"
International research: "Q&A: Research in Europe '98"
International research: "Keys to the conducting international research: Quality control will help lead to success"

December

Qualitative research: "Digital recording of qualitative interviews"
Qualitative research: "Making the right moves — Can you judge a research firm by how it handles an information request?"
Qualitative research: "The art and science of effective qualitative interviews"
Qualitative research: "Conducting qualitative research among

Asian-Americans"

Qualitative research: "Is 'Internet focus group' an oxymoron?"
Qualitative research: "Face/Off — A pharmaceutical projection technique"
Qualitative research: "A focus group confession: 'What's so bad about bean quantitative?'"
Qualitative research: "Guidelines for the future — MRA/QRCA joint committee-recommended best practices for qualitative database development and usage"
Qualitative research: "Releasing the child within — Techniques for moderating kids' groups also work with adults"
Qualitative research: "Notes on focus group recruiting"

Data Use

February

"Trade-off analysis: a survey of commercially available techniques"

March

"A review of four powerful data analysis programs for Windows 95 (DBMS/COPY 6.0, DeltaGraph 4.0, SPSS Diamond, SYSTAT 7.0)"

June

"Have you ever wondered. . ." (answers to several data analysis-related questions)

July

"High-tech surveys have arrived — a review of software for interviewing on the World Wide Web and with a PC (Decisive Survey for Windows, Sensus Multimedia for Windows, SurveySaid for Windows)"

October

"Measuring customer satisfaction: drive your action with derived importance analysis"

November

"The insignificance of significance testing"

Trade Talk

March

"Cheap PCs: Is the revolution finally here?"

April

"Cheap PCs part II: falling prices, rising expectations"

May

"I shop, therefore I am unconscious" (an interview with shopping theorist Hugh Phillips)

June

"Study examines choices between national brands, private labels"

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"QMRR Web site adds more features"

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Trade Talk

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companies try to outdo each other in the rush to make every customer feel catered to."

Trend #3: "Morality Bites"

When it comes to social issues, we can forget moderation and compromise in 1999, says Salzman. She foresees a year in which people on either side of hot-button issues will become increasingly rigid in their views, more vocal — and even violent. "Perhaps because there's a sense that we need to start the next millennium with a clean slate, many people are becoming obsessed with righting what they perceive as society's wrongs — whether those 'wrongs' be abortion, the abuse of animals, or homosexuality," says Salzman. "In 1999, voices of moderation and reason will be drowned out as extremists wrest control of social and political organizations."

Trend #4: "Big Brother.com"

Now that the ease of the Internet has lured so many of us to move our businesses, communication, and shopping on-line, we're beginning to feel increasingly uneasy about the potential for tampering and on-line snooping. "The message we're hearing more and more these days is don't trust anything that can be digitally altered," says Salzman. "Well that pretty much covers everything for those of us who spend much of our days on-line." Salzman predicts both an increase in efforts to secure digital communications and a renewed value placed on the printed word.

Trend #5: "Global Bucks"

1999 will mark not just the introduction of the euro, but also increased reliance on the now-ubiquitous dispenser of truly global money: the ATM. The opportunity for instant monetary exchanges and convenient purchasing (of such items as postage stamps, prepaid phone cards, and theater tickets) will extend consumers' relationship with the ATM, making it an even more indispensable part of life. Look, too, for a move toward increased personalization of ATMs, enabling users to specify standard "preferences" that permit them to bypass questions about such things as preferred language, preferred denominations, and whether a receipt is desired.

Trend #6: "Old News"

Forget ultramodern. Luxury lies in the homespun comfort of times past. From corporate retreats in ancient locales to vintage fashions, a return to the past signals the increased value we're placing on bygone eras. "Early in this century, the hottest products and fashions were those that were most modern," O'Reilly notes. "As the century comes to an end, many consumers are reacting to premillennial uncertainty by clinging to what they perceive as symbols of refinement and elitism that today seem to elude us.

We'll see this trend played out in a variety of ways, from a boom in 19th- and early 20th-century hand-crafted items to renewed interest in etiquette classes and 'finishing schools,' to the creation of underground social clubs that mimic the clandestine men's clubs of old."


Trend #7: "The New Me Generation"

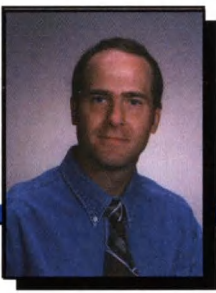
Around the world, there's a growing sense that we can rely on no one but ourselves. In much of Europe, benefits traditionally available under the cradle-to-grave welfare system are being rescinded; in Japan, one's duty to live with and care for one's parents is no longer considered mandatory; and in most of the world, the concept of lifelong corporate loyalty has taken a direct hit. The reality is that most of us can no longer afford to rely on our governments, our employers — or even our children or "life partners." The results will range from a continued rise in entrepreneurship to new insurance products and personal investment vehicles intended to guard us against the vagaries of the future.

Trend #8: "Think Small"

In the next millennium, it appears that being big in many cases will be regarded as more of a handicap than an asset. Whether one is talking about nations or companies, there's a sense that the fight will go to the entity that is most streamlined and that has the agility to adapt to our changing times. In the world of e-commerce, we've seen upstart Amazon.com refuse to cede much ground to its behemoth competitor, Barnes & Noble.com. In the off-line world of fiber-optic cable, Qwest Communications has leaped ahead of such megacompetitors as AT&T and MCI WorldCom by virtue of having no preexisting infrastructure around which to work. "The small-is-better trend is perhaps best showcased by the tremendous success of the Netherlands in recent years," notes Salzman. "Though it's no bigger than the state of Rhode Island, the Netherlands has actually been ranked as the fourth-most competitive nation in the world by the International Institute for Management Development."

Trend #9: "Return to Valley of the Dolls — Again"

From Viagra to Prozac to "miracle" diet drugs, consumers are snapping up all manner of pills for what ails them. "It's all a part of consumers' growing impatience with anything but the quickest fixes," O'Reilly says. "In 1999, we can expect to see even greater growth in the areas of self-medication and self-education on health-related issues. The notion that we should blindly follow the advice of our physicians has gone by the wayside in the age of AIDS. HIV-positive patients have demonstrated to all medical consumers how important it is to get second, third, even fourth opinions, to seek out 'alternative' treatments, and to take responsibility for staying abreast of information and developments pertaining to one's ailment." 



Trade Talk

By Joseph Rydholm/QMRR editor

Nine trends for '99

As we count down to the new millennium, I thought the following material, taken from *Future Dialogue*, a weekly newsletter from the Brand Futures Group (BFG) of New York-based Young & Rubicam Inc., might be of interest to those looking for opinions on the trends that may shape our journey to the year 2000. According to Marian Salzman, director of the BFG and the company's "chief futurist," and Ann O'Reilly, editor-in-chief of BFG, here are nine trends that will play out in the coming months. (An expanded version of these "Nine Trends to Watch in 1999" is available for sale at www.nowandnext.com/1999 in a Futurescope trend report.)

Trend #1: "Teach Your Children Well"

Expect to see a growing movement of parents taking primary responsibility for their children's education. This trend will encompass a rise in home schooling (and increasingly sophisticated products and services geared toward this market), more niche-focused edutainment software, and increased testing of toddlers and preschoolers to ensure they're "on the right track."

"As we head into the uncertain world of the next millennium,

parents are feeling increased pressure to prepare their children to succeed," says O'Reilly. "They're taking the educational initiative by purchasing home computers, signing up their children for cultural and educational enrichment programs, and buying toys that have more to do with attaining developmental goals than with having fun. There's even a CD-ROM available now, from SmarterKids.com, that analyzes the 'pre-academic' and academic skills of children ages three to six."

Trend #2: "Just Right"

Mass merchandising has its place, but 1999 will be the year of customization. As new technologies allow for personalized marketing efforts, body scans to ensure an exact fashion fit, and opportunities to do it yourself (whether "it" be painting pottery, mixing scents, or customizing paint colors), consumers will grow increasingly impatient with products and services that don't deliver precisely what they want. "It's not just a question of demanding more," says Salzman. "It's a question of expecting more. We'll see this trend toward individualized products and services snowball as

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