



# QIIRK'S

Marketing Research Review

Volume XIII, Number 9

October 1999

## **Satisfaction research: Numbers don't tell the whole story**

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satisfaction  
scale***

***Integrating the  
voice of the  
customer***

***1999 Customer Satisfaction Directory***

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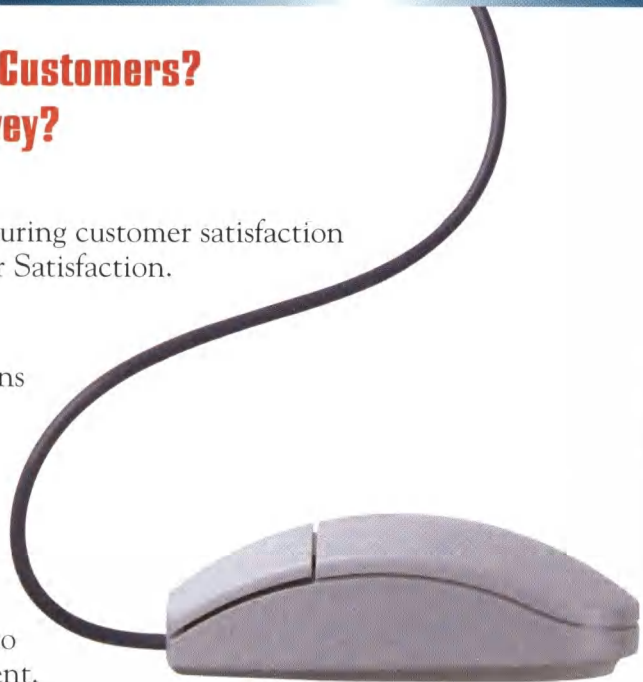
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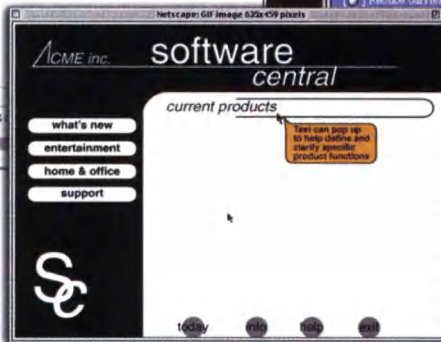
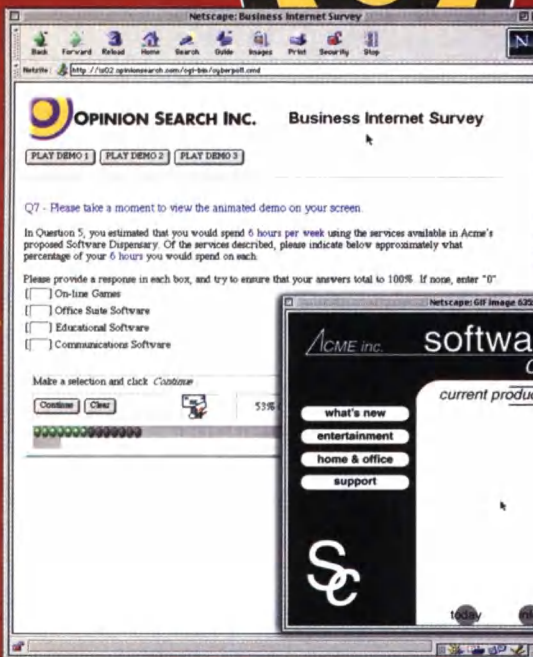


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## Home equity market drying up?

The home equity credit market appears to be built on an eroding foundation, according to results in a recent research study by Atlanta-based Synergistics Research Corp. entitled "Innovative Channels for Marketing Home Equity Credit." About one in 20 (6 percent) homeowners currently have a home equity line of credit, with about half of these (3 percent)



being inactive holders reporting that they do not have a balance or have not accessed their line in the past year. About one-fifth of the homeowners have had a line in the past. This is about three times the number of current holders. Comparisons with previous Synergistics research studies show that incidence of home equity credit has declined since 1992. "As the new millennium approaches, lenders face a challenge to rebuild the home equity market by reintroducing home equity products to homeowners. If lenders take immediate action, they could reverse the declining fortune of this product. Because it is a small niche product, even small conversions of non-holders will translate into significant market growth," says Anne Morgan Moore, president of Synergistics. For more information call 404-237-3373.

## Kids need more personal finance advice

While personal finance classes are offered in many schools, the American Savings Education Council's (ASEC) 1999 Youth & Money Survey found that most students would rather get their savings lessons at home. Trouble is, adults may not have the advice they need. The 1999 Youth & Money Survey, released by the ASEC, the Employee Benefit Research Institute (EBRI), and Mathew Greenwald & Associates, shows that 94 percent of students ages 16-22 say they turn to their parents for financial advice. But the 1999 Retirement Confidence Survey (RCS) found that one-third of adults do not think they are disciplined at saving, 30 percent spend money compulsively, and over 40 percent do not pay off their credit cards at the end of every month.

"Students today are more money savvy, but they are also bombarded with opportunities to spend," says Don Blandin, president of the ASEC. "Our survey shows that students are turning to family and friends [instead of schools] for financial advice, so it is vital that everyone learn the facts about saving and investing."

The youth survey found that only 21 percent of high school and college

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## Doctors have taken to the Net

In June, Caduceus Marketing Research, Mt. Arlington, N.J., conducted an on-line survey among a sample of 100 physicians who agreed to complete a survey using the firm's on-line system. Respondents included physicians from the following specialties: primary care physicians (FP/GP/IM); cardiologists; obstetricians/gynecologists; and pediatrics. The questionnaire contained a number of questions specific to Internet usage, as well as some product-specific questions.



Highlights from the study include:

- Internet access: 62 percent of physicians access the Internet from their home; and 36 percent of physicians access the Internet from their office.
- How often do they use Internet? Every day, 69 percent; several times/week, 28 percent; once a week, 3 percent.
- How long have they been using the Internet? More than two years, 69 percent; one to two years, 23 percent; six to 12 months, 9 percent.
- How frequently do they check their e-mail? Every day 59 percent; several times a week, 32 percent; once a week, 9 percent.

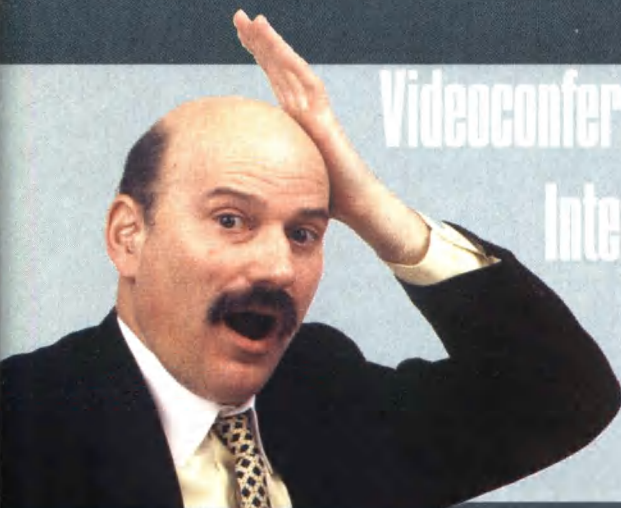
About half of the respondents report they have searched the Internet for pharmaceutical product information. New products are most often the target of their Internet searches.

Doctors were asked how the Internet helps them most often with their practice. Researching new products, quick access to current medical information and access to Medline are the most often mentioned ways in which the Internet helps their practice. When asked what the pharmaceutical industry could do to help physicians with their practice, the most popular responses were: provide information on new products, update information on drug interactions, and provide access to clinical trial information.

Half of the physicians responding recommend educational Web sites to their patients.

Physicians were asked to specifically rate several potential services to gauge their interest in receiving these services. Physicians are interested in the ability to: order prescription samples on-line; receive new product information via e-mail; and request samples of over-the-counter medications. For more information call Tom Simpson at 973-770-4000.

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# Names of Note

**Dr. Solomon Dutka**, outspoken advocate for the application of scientific principles in the field of marketing research and co-founder of *Audits & Surveys Worldwide*, died on August 7th at his home in Riverdale, N.Y., due to complications from a stroke. He is survived by his wife, Joyce, stepsons David, Barry and Stephen Fried and his sons James and Michael Dutka.

The Marketing Research Association announced its 1999 National and Chapter Awards at its annual conference in Boston in June. The Distinguished Service Award was given to **Sharon Mutter**, president of Sharon Mutter Field Sources, Carmel, Ind., in recognition of "extensive and distinguished service to both the association and the marketing research industry." The Award of Excellence is given in recognition for excellence in

service for the current year at both the National and Chapter levels. This year the award was presented to two members, a first-time occurrence for the association. The winners were **Val Maxwell**, president, National Data Research, Inc., Northfield, Ill., and **Jane Rosen**, Nichols Research, Sunnyvale, Calif. Chapter awards were presented to the following: **Michele Avant**, Jackson & Associates, Inc., Atlanta, Atlanta/SE Chapter; **Bernadine McGinnis**, American Medical Association, Chicago, Chicago Chapter; **Barbara Nolan**, Barbara Nolan Market Research, Maitland, Fla., Florida Chapter; **Terilyn Reber Vaught**, ACNielsen BASES, Covington, Ky., Great Lakes Chapter; **Peter Van Brunt**, ReData, Inc., Bethesda, Md., Mid-Atlantic Chapter; **Lisa Denning**, Blue Cross Blue Shield of Minnesota, St. Paul,

Minnesota/Upper Midwest Chapter; **Dorothy Bacon**, Granite State Mktg. Research, Inc., Londonderry, N.H., New England Chapter; **Gail Adams**, The Wats Room, New York, New York/NE Chapter; **Angela Gomez**, Research Data Design, Portland, Ore., Northern California/Pacific NW Chapter; **Adrienne Goldbaum**, Consumer Research Center, Las Vegas, Nev., Southern California Chapter; and **Barbara Rosner**, Rosner Field Audits, Tempe, Ariz., Southwest Chapter.

**Adam Hill** and **Russell Wojcik** have joined *Knowledge Systems &*



Hill

Wojcik

*Research*, Syracuse, N.Y., as research analysts.

**Richard (Rick) Tobin** has been appointed president of Strategy



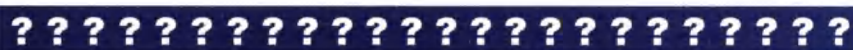
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Research Corp., Miami, replacing founder Richard W. Tobin. In addition, **Monica Campana** has been promoted to project director.

**Sharon Johnson** has joined *PTM Research*, Ann Arbor, Mich., as vice president.

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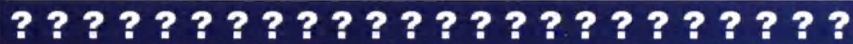
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formats for transcriber instructions, reporting, presentation), and project conclusion (three formats for billing and project evaluation). For more information call Ron Riley at 800-670-2387 or visit the company's Web site at [www.bestprax.com](http://www.bestprax.com).

## New regression tool

Salford Systems, San Diego, Calif., has introduced MARS, a regression tool for data mining and predictive modeling. An alternative to neural networks and conventional regression models, MARS was designed to solve problems such as how to predict credit card holder balances, insurance claim losses, and cell phone usage with accuracy. MARS (an acronym for multivariate adaptive regression splines) builds its models automatically, self-tests to ensure validity, and graphically displays the effect of

each important variable on the outcome.

Using a Windows-based interface, the analyst provides MARS with a database and target variable; MARS then develops a model, self-tests to prevent overfitting, and graphically displays the impact of each predictive factor on the outcome. Predictions for new data can be obtained either through the MARS engine or via C-source code produced as part of the modeling process.

MARS is designed for predictive modeling problems involving continuous outcomes, such as how much a customer will spend on a catalog order, the minutes a customer will use his cell phone, or how electricity production will change as generator inputs change. MARS can also predict yes/no binary responses such as whether a consumer will default on a loan, refinance a mortgage, or defect to a competitor.

Experienced data analysts also can use MARS as an exploratory tool to refine and improve more conventional linear and logistic regression models. By automatically detecting needed variable transformations and interactions, MARS can reduce the time required to build a model and improve its predictive accuracy. MARS is supported in a variety of standalone and client/server operating environments. For more information call Kerry Martin at 619-543-8880 x22, or visit the company's Web site at [www.salford-systems.com](http://www.salford-systems.com).

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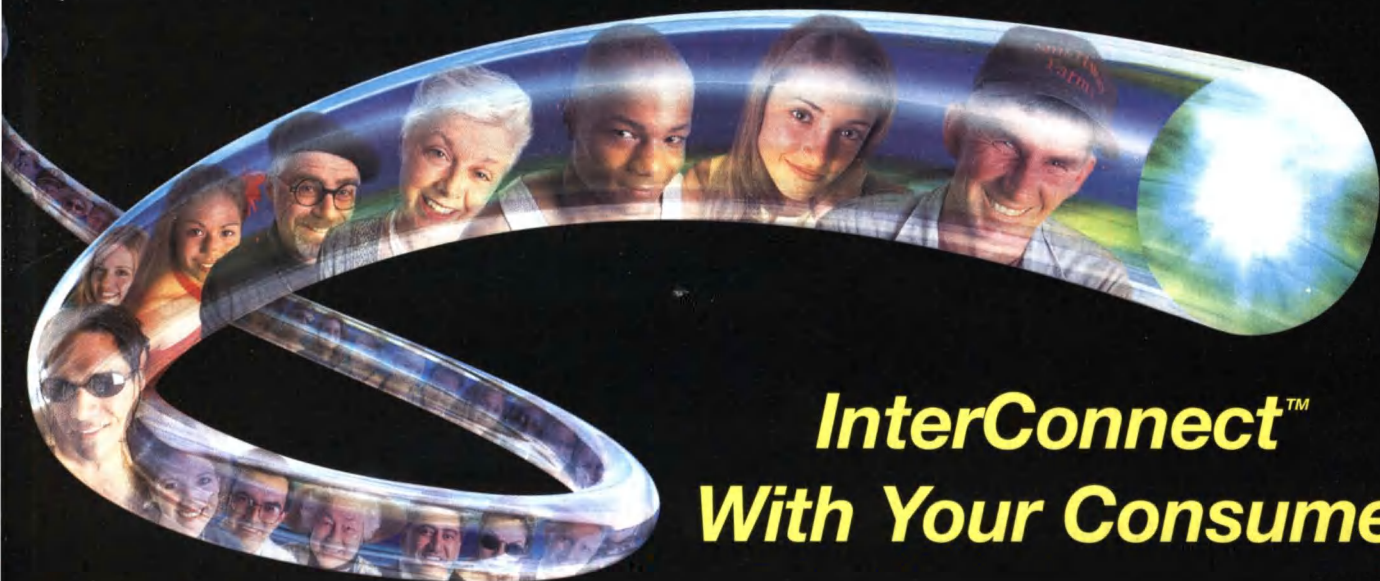
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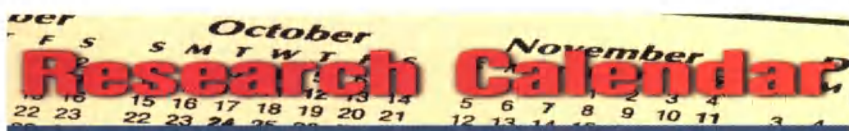
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**CASRO ANNUAL WORKSHOP:** The Council of American Survey Research Organizations (CASRO) will hold its annual conference from November 3-5 at The Charleston Place, Charleston, S.C. For more information visit the organization's Web site at [www.casro.org](http://www.casro.org).

**MRA FALL CONFERENCE:** The Marketing Research Association will hold its Fall Education Conference and Technology Forum from November 3-5 at the Hyatt Regency Hotel in San Antonio, Texas. Conference events include sessions on researcher education and a look at how research can survive amidst the growing consumer concern about privacy. The Technology Forum exhibits will provide information on current research tools and demonstrations of the latest technology available for researchers. For more information call 860-257-4008 or visit the MRA Web site at [www.mra-net.org](http://www.mra-net.org).

**MYSTERY SHOPPING WORKSHOP:** The Mystery Shopping Providers Association will hold its first annual Fall Workshop in Chicago on November 5. For more information visit the organization's Web site at [www.mysteryshop.org](http://www.mysteryshop.org).

**AMA AGRIBUSINESS RESEARCH CONFERENCE:** The American Marketing Association will hold its agribusiness marketing research conference at Adam's Mark Hotel, San Antonio, Texas, from November 7-9. For more information call 312-648-0536 or visit the organization's Web site at [www.ama.org](http://www.ama.org).

**INSURANCE RESEARCH CONFERENCE:** The Society of Insurance Research will hold its annual conference on November 7-10 at the Tradewinds Hotel & Resort in St. Petersburg Beach, Fla. The conference also includes workshops and exhibits. For more information call Stan Hopp at 770-426-9270 or visit the organization's Web site at [www.sirnet.org](http://www.sirnet.org).

**WEB RESEARCH CONFERENCE:** The Institute for International Research (IIR) will hold a conference titled "Mastering Web-based Surveys & Online Research Techniques" from November 8-10 at the W Hotel in San Francisco. For more information call 888-670-8200 or visit the IIR Web site at [www.iir-ny.com](http://www.iir-ny.com).

**SENSORY EVALUATION WORKSHOP:** As part of its workshop series "Issues in Sensory Evaluation," Tragon Corporation will hold a workshop entitled "Quality Control and Stability Testing" on November 8-10 at the Sheraton Palo Alto, Palo Alto, Calif. The program will focus on organizational approaches to establishing product quality monitoring systems within manufacturing and R&D; methods for measuring product quality and stability, including design and analysis. For more information call 650-365-1833 or visit the company's Web site at [www.tragon.com](http://www.tragon.com).

**AUTOMOTIVE BRANDING CONFERENCE:** Allison Fisher, Inc., McKinsey and Company and Marketec Systems, Inc., will hold a conference titled "New Insights Into Automotive Branding" on November 12 from 8 a.m. to 2 p.m. at the Ritz-Carlton Hotel in Dearborn, Mich. Topics to be covered include: the Internet and the commoditization of brands; brand expectations and the breadth vs. depth of customer satisfaction; the make/model brand debate — who is right?; and, are retail attributes inherent in product brands? For conference details and to pre-register, visit the Marketec Web site at [www.marketec-systems.com/conference.htm](http://www.marketec-systems.com/conference.htm).

**WORLDWIDE QUALITATIVE RESEARCH CONFERENCE:** The European Society for Opinion and Marketing Research (ESOMAR) will hold its Worldwide Qualitative Research Conference from November 28-30 at the Hotel Athenaeum InterContinental, Athens, Greece. For more information visit the ESOMAR Web site at [www.esomar.nl](http://www.esomar.nl).

Harris Interactive, a Rochester, N.Y., research company, announced the launch of the Harris Sports Poll. The Harris Sports Poll provides information for the sports industry to make sound strategic decisions. The poll asks numerous questions on sponsorship, fan level, Internet, media, purchasing, participation, hot topics and more with a significant number of respondents to provide targeted information on consumers' sports related interests and behaviors and to predict future trends. The Harris Sports Poll will enable the media to see what the viewing public thinks about vital issues in the sporting world - providing data for feature stories and revealing what is hot in sports, teams, markets, and current events. For additional information contact Harris Interactive at [www.harrisinteractive.com](http://www.harrisinteractive.com).

Florida-based research firm **SIL - Worldwide Marketing Services** has moved its offices to 413 Northeast Third St., Delray Beach, Fla., 33483. The firm has also opened a Latin America CATI Centre in Miami for central location business-to-business telephone research.

**Nielsen Media Research** has entered into a definitive merger agreement under which **VNU USA, Inc.**, a wholly-owned subsidiary of VNU NV, will acquire all of the common stock of Nielsen Media Research for \$37.75 per share in cash. VNU is a publicly traded international publishing and information company headquartered in Haarlem, the Netherlands. The Nielsen Media Research - NetRatings, Inc. agreement will not be affected by the merger.

Full-service research firms **Quick Test, Inc.**, Jupiter, Fla., and **Heakin**

**Research.** Olympia Fields, Ill., have announced that they will merge. The senior management teams at both firms will remain in place. The new network of firms will have over 100 locations in 40 markets covering 26 states.

**Doane Marketing Research.** St. Louis, is now offering a shared-cost market research study entitled "Part Time, Pleasure Farmers and Their Farm Input Purchasing." For more information call Marypat Corbett or Jim Johnson at 314-878-7707.

The Rowes Wharf focus group center of **Focus On Boston** is now a member of FocusVision Worldwide, providing videoconferencing services.

Barbara Burbridge, former director of operations and field manager for Frederick Schneiders Research, Washington, D.C., has founded her own company, **Data Harvest**, an independent field management firm located in Gaithersburg, Md. For more information call 301-963-5138.

Chicago-based **C&R Research Services'** proprietary computerized interviewing technology CRIMSON was used to identify the commercial designated as the Best of Show at the Golden Marble Awards in New York in September. Children ages nine to 13 viewed the 17 Golden Marble category winners and selected their favorite

VNU Marketing Information Services has joined two of its divisions, **National Decision Systems** and **Claritas Inc.** Both firms provide business information products and services. With the change, NDS becomes an operating division of Claritas. Concurrent with the announcement, Robert Nascenzi has been named president and CEO of Claritas.

**Total Research Corp.**, Princeton, N.J., has been selected as a Microsoft Marketing Vendor Program Member. Program members are firms from a wide range of industries that work with Microsoft to extend the Microsoft brand through marketing communications.

The Foote, Cone & Belding ad agency is now using the on-line research services of **Digital Marketing Services**, Dallas, as part of its client strategy development.

**Varga Research**, Orlando, Fla., has opened a new focus group facility, featuring four focus group rooms. Each room contains private viewing areas, seating for up to 25, client discussion rooms, separate climate controls and audio/video recording. For more information call Rachel Jarrell at 407-248-0777.

Data collection firm **Field Facts Worldwide** has moved its operation to London's West End. The location features focus group facilities, a test kitchen, and a CATI facility. The new address is 11 Weymouth St., London, WIN 3FG. Phone 44-171-906-6600. Fax 44-171-906-6666.

Earlier this summer, CLT Interactive, a division of **CLT Research Associates**,

continued on p. 76

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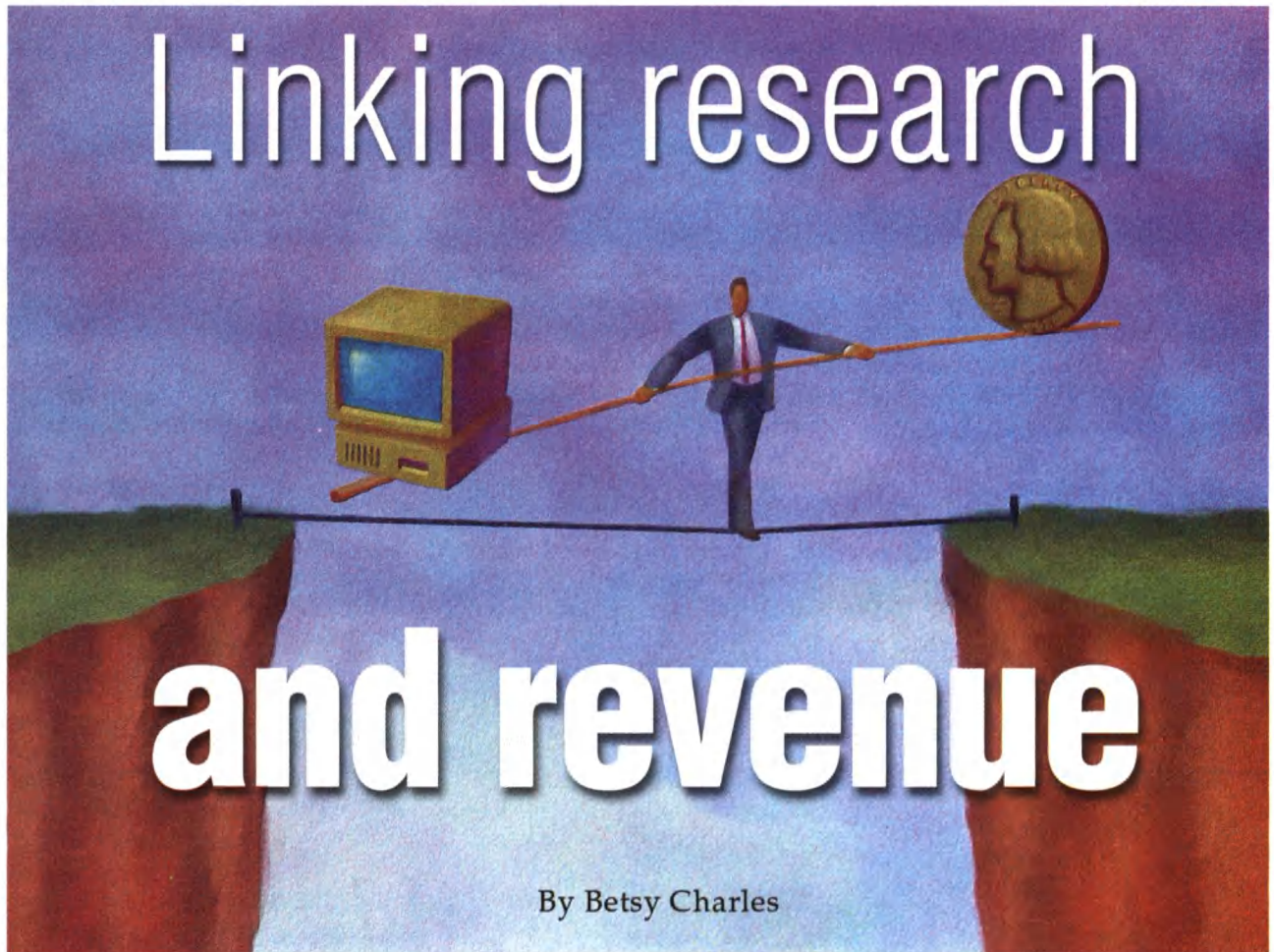
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# Linking research



# and revenue

By Betsy Charles

*Editor's note: Betsy Charles is president of Strategic Power, a research and consulting firm in Germantown, Wis. She can be reached at 414-250-0857 or at DocBetsy@aol.com.*

Company executives often evaluate research proposals with this question in mind: "Will the research increase our company's bottom line?" Many have had experience with research that had little value to the company. Although the research measured perceptions, it wasn't linked to revenues. Thus, they tend to avoid research unless they see its practical value. In fact, most perceive research as a cost, rather than as a means to increase revenues.

The purpose of this article is to show how research can increase a company's bottom line. We present several approaches that link research to revenues, using data from customer satisfaction or employee attitude surveys to measure how specific improvements would increase a company's revenues.

**1. Linking overall satisfaction to revenue.** This approach requires data on each respondent's overall satisfaction with

the performance of a strategic business unit (SBU) and each respondent's purchases from the SBU over a certain period of time. The first step is to group respondents by their level of overall satisfaction and then to average the purchases of each group. In the following example, we expect revenues to increase \$100 per customer if overall satisfaction increases one level (or \$50 per customer if overall satisfaction increases a half level), assuming all else is equal:

Level	(1) Very Dissatisfied	(2)	(3)	(4)	(5) Very Satisfied
Average	\$600	\$700	\$800	\$900	\$1000

**2. Linking aspects of satisfaction to revenue.** This approach requires data on each respondent's level of satisfaction with various aspects of the SBU's performance and each respondent's purchases over a certain period of time from the SBU. The first step is to link each aspect of satisfaction with purchases using simple regression analysis. In this analysis, the independent variable is an aspect of satisfaction and the dependent variable is purchases from the SBU. Simple regression analysis measures the amount an

continued on p. 70



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# SOMETHING OLD, SOMETHING NEW

MAIL SURVEY, IN-HOUSE DATABASE  
HELP LA QUINTA INNS MONITOR  
GUEST SATISFACTION

By Joseph Rydholm  
QMRR editor





**T**hough its lodging properties have a distinctly traditional feel, La Quinta Inns is taking an untraditional approach to analyzing and distributing the data from its customer satisfaction research. La Quinta is joining a growing number of firms that are harnessing the power of computers to extract more value from their research. Their efforts may make the frantic client-to-supplier phone call a thing of the past.

Founded in 1968 and still based in Texas, La Quinta owns and operates over 300 limited service, mid-price hotels, primarily in warm-weather regions of the U.S. The chain includes both La Quinta Inns and La Quinta Inn & Suites locations, which are larger and boast additional amenities.

The company's customer satisfaction program is fairly standard stuff: a mail survey is sent to a sample of recent guests at each property and the results are distributed quarterly to management. But with the help of its research partner, Minneapolis-based Custom Research Inc. (CRI), La Quinta is doing the quarterly report one better, using a desktop system to give its regional and general managers a lot more control over the kind of information they can extract from the results and allowing them to understand satisfaction by customer segment and individualize key drivers for each hotel.

CRI sends the updated survey data to La Quinta management on Zip disks, which they incorporate into a database CRI developed for La Quinta. "They are actually managing the database themselves," says Marcia Gunderson, research manager, Custom Research Inc. "So it saves a lot of time because normally if they had questions or areas that they wanted to look at, they would have to call us and ask us to dig into it. Now they can go into the database themselves and look at the most recent data right

down to the property level."

CRI is flexible in working with clients to design the most appropriate on-site data analysis capability, Gunderson says. In La Quinta's case, Microsoft programs Access and Excel are used to view and manipulate the data. "Each company has its own way of doing business and we try to accommodate clients so they don't need to spend a lot of money on setting up systems to run the program," she says.

#### **Comment cards**

In the mid-'90s, La Quinta used comment cards distributed at check-in by the front-desk clerk to measure satisfaction. It's a form of customer feedback but one subject to all kinds of inconsistencies and influences.

Since the summer of 1997, La Quinta and CRI have used the mailed satisfaction survey. The company has worked hard to make the survey easy for guests to fill out and relevant for its managers, says Jim Gard, La Quinta's director of relationship marketing and research. La Quinta conducted focus groups with guests to determine the factors that contribute to a satisfying lodging experience and also to have them fill out early versions of the mail survey. "We timed the questionnaire in the groups to make sure it was no more than three or four minutes. There are just so many things you can ask about but you have to draw the line somewhere," Gard says.

Questionnaire development focus groups with front-desk service people and La Quinta managers helped win their buy-in to the process and also showed them that the survey wouldn't be measuring service aspects that were out of their control. "You want people to believe that the survey questions represent an accurate measurement of what they do and things they could change if scores were not so good. We wanted to make sure they

felt that they had some input into what the customer evaluates on the form," Gard says.

(La Quinta has a head start on one crucial aspect of a mail survey: The guest registration process in most cases yields accurate and up-to-date addresses and other information, so the surveys reach the right people and reach them quickly. The only roadblocks, Gard says, are rooms that are booked by business travelers who list

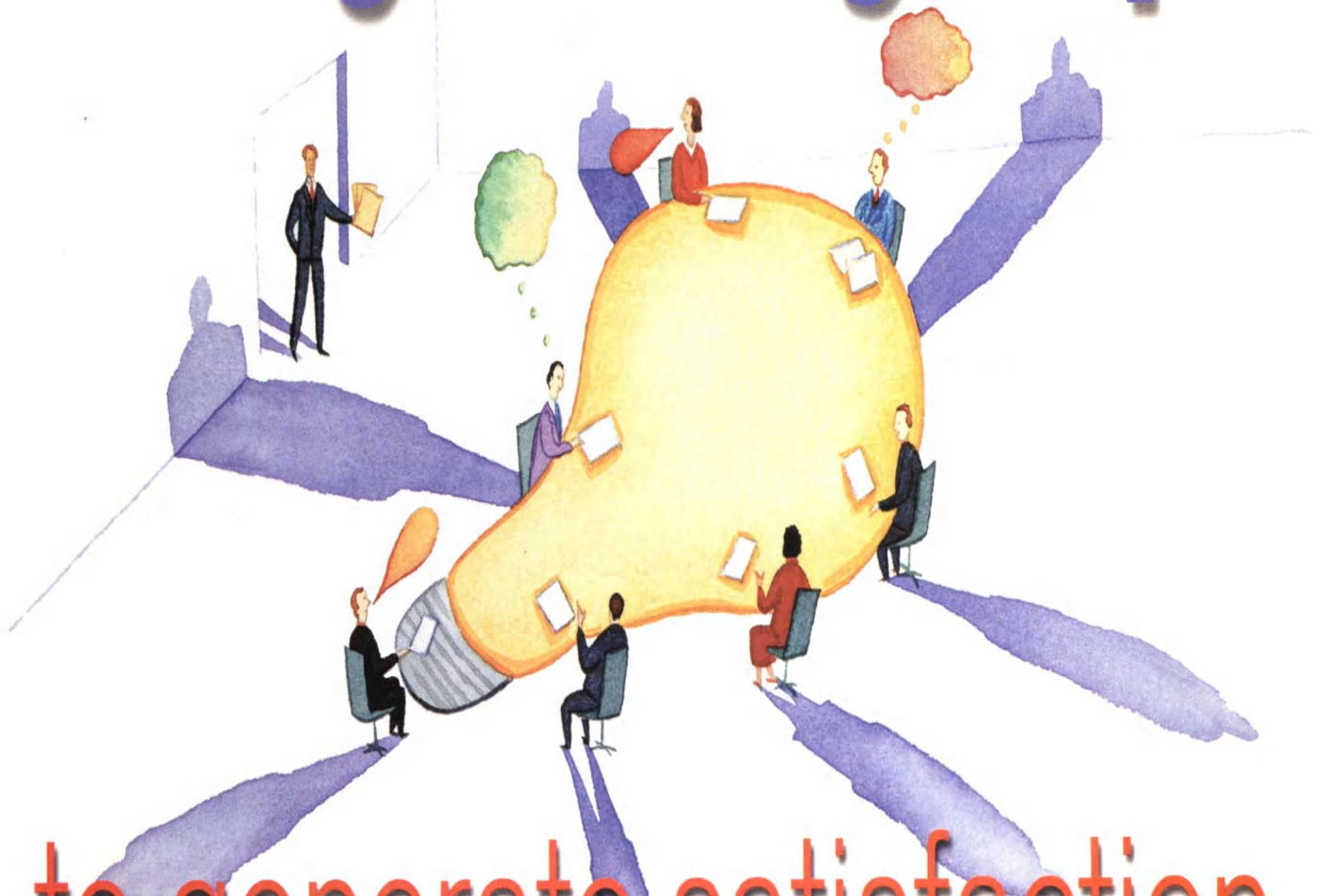
"YOU WANT PEOPLE TO BELIEVE THAT THE SURVEY QUESTIONS REPRESENT AN ACCURATE MEASUREMENT OF WHAT THEY DO AND THINGS THEY COULD CHANGE IF SCORES WERE NOT SO GOOD. WE WANTED TO MAKE SURE THEY FELT THAT THEY HAD SOME INPUT INTO WHAT THE CUSTOMER EVALUATES ON THE FORM," GARD SAYS.

their accounts payable department's address and those booked by travel agents.)

The survey covers the basics of a lodging stay chronologically, including check-in, the condition of the room, any problems the guest may have encountered, and La Quinta's continental breakfast. "We start from  
continued on p. 73

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# Using focus groups



to generate satisfaction  
questionnaire content

By Lori Laflin and David E. Hyatt

*Editor's note: Lori Laflin is the director of data processing at CJ Olson Market Research, Minneapolis. She can be reached at 612-378-5040 or at cjo@minn.net. David E. Hyatt is the customer results and service manager at Decotiis Erhard Strategic Consulting, Colorado Springs, Colo. He can be reached at 719-448-0400 or at DHyatt@DESCG.com.*

**C**ustomer satisfaction and customer retention are the cornerstones of many business mission statements and strategies. This is a good thing. Businesses in this country and around the world are focusing on their customers like never before. Rather than Henry Ford's "any color as long as it's black," philosophy, today's executives are developing quality initiatives and taking to heart catchphrases like "mass customization." This focus on the customer requires that businesses actually talk to their customers to determine what it is they want as well as how effectively goods and services are being delivered. The result is that many people who never had to think about survey research have suddenly found themselves in a position of responsibility for the company's entire customer satisfaction program. And, while anybody can write questions, it is much more difficult to write good or meaningful questions.

To have an effective survey instrument (i.e., one that provides actionable information) and make the best use of the information you collect, it is important that the items developed have the following characteristics:

- they measure attributes that are relevant to the customer;
- they measure attributes that affect behavior;
- they measure those attributes reliably; and,
- they produce actionable results.

So, how do you do this? This article

discusses how to develop survey items with the above characteristics. While we'll focus on customer satisfaction research, many of the principles discussed are just as relevant to other research applications.

### Generating content

In general, there are four ways to generate survey content or items: make it up, use research literature, copy existing surveys and use focus groups and qualitative interviews.

Making it up, while not the most scientific or best way, is probably the most common method of generating survey content. While this method is often relatively inexpensive up front because "we know what's important to our customers," it is often the most costly in the long run. If the items developed do not reflect things important to customers or don't result in actionable information, the survey project will be a waste of your valuable time and money. Therefore, we recommend using one of the other methods.

Rather than making up the content, there are two sources that can be quite useful in the development of survey content: research literature and existing surveys. There are numerous articles in which the authors discuss customer satisfaction and survey content. Distilling the essence of these articles and the content areas they discuss and then developing a survey to measure them for your own purposes can be quite effective. These articles are often available over the Internet or at your local library. Existing surveys might include something done previously at your company or done by a competitor. While these can provide you with good background and help point you

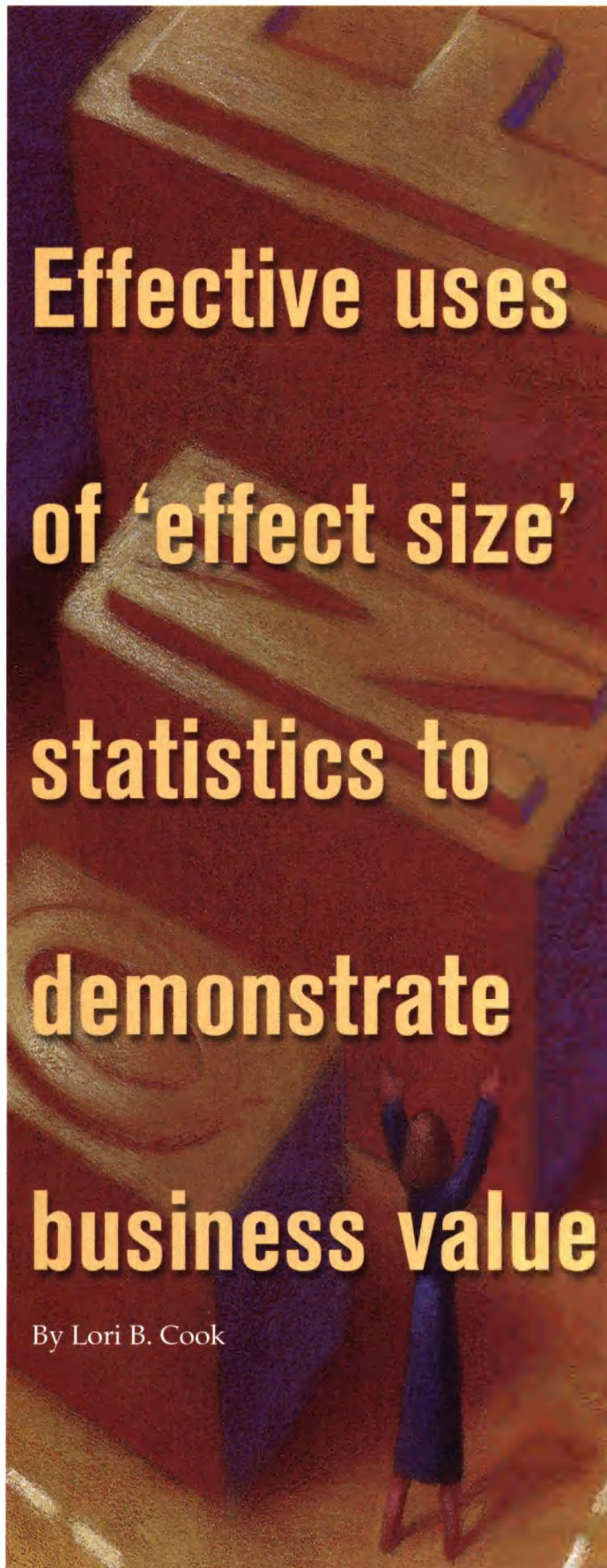
in the right direction, consider the following: the survey content used for one study is not necessarily relevant to yours. For example, one survey might assess customer satisfaction with a call-in help line. While you may have a call-in line, perhaps your calls are of a more technical nature or your representatives deal with different types of callers. So, using the questions from the existing survey to ask about the help line on your survey would be a waste of time. Make sure that the questions you ask are relevant to both your audience and your organization and that you can actually act on the sug-

Make sure that the questions you ask are relevant to both your audience and your organization and that you can actually act on the suggestions you get from the survey results.

gestions you get from the survey results. (Also, be careful copying survey content — you can run into copyright problems.)

The final way to develop content is the one we recommend for most applications: using qualitative data collect-

continued on p. 74



By Lori B. Cook

*Editor's note: Lori Cook is a senior research analyst at Blue Cross Blue Shield of Maine, Portland. She can be reached at 207-822-8964 or at [lori\\_cook@bcbsme.com](mailto:lori_cook@bcbsme.com).*

**T**his article is the first in a three-part series designed to provide real-world business examples of the effective use and application of research and statistical tools for supporting resourcing and priority-setting decisions. Each of the three articles in the series provides a summary review and example of how marketing research, when approached as a credible discipline and with a clear view of specific decision support needs, can very effectively shape executive decision making.

This article reviews “effect size” statistical testing tools as a means for assessing meaningful research outcomes; it focuses on successes using measures of “effect size” — in lieu of or in addition to statistical significance testing — to effectively demonstrate quality improvement and impact of customer satisfaction-based interventions.

#### **Assessing research outcomes: statistically significant vs. meaningful differences**

Organizations implementing quality improvement programs often use customer satisfaction survey research to track the effectiveness of improvement activities and interventions. Typically, determinations of program effectiveness (e.g., change from baseline to re-measure, or differences between independent groups) are based on statistical significance testing of research results. For example, z-tests or chi-squares are used to determine the statistical significance of the difference between proportions, whereas t-tests are used to determine statistically significant differences between means. Statistical significance tests such as these indicate the probability that research outcomes can reasonably be attributed to the program interventions, or whether they are simply due to chance. “Statistically significant” results can then be interpreted to mean that the program interventions have been successful, while non-statistically significant results indicate that the program interventions have not been successful.<sup>1</sup>

For effective interpretation and application of such research results, it is important to note one of the limitations of traditional statistical significance testing: statistical significance is highly dependent on sample size (that is, the opportunities for achieving statistically significant results increase as sample size

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\* Impulse Survey of Focus Facilities 1999.

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increases, and decrease as sample size decreases). Therefore, two studies with similar results may yield very different outcomes when statistical significance testing is applied, if the sample sizes used in the studies are different.

Because of this dependence on sample size, "statistically significant results" cannot always be equated with "meaningful results" (i.e., results that have important business, managerial, or scientific implications). It

is possible for a large-sample study to have statistically significant results that do not reflect "meaningful" change or difference; conversely, it is possible for a small sample study to yield "meaningful" results without "statistical significance." D. Kenny

tical significance testing is useful, one that measures the magnitude of a result, rather than the probability that the result is due to chance.

The most commonly used metric to evaluate the magnitude of an outcome is "effect size" (Cohen, 1988), or the

**Table 1. Statistically significant vs. meaningful research outcomes**

Statistically significant outcomes	Assessment based on statistical significance testing: the statistical significance level (p value) indicates the probability that the differences achieved (as indicated by test statistics such as t, r, z) are due to chance. A p value of $\leq .05$ is conventionally accepted as statistically significant. The p value is highly affected by sample size.
Meaningful outcomes	Assessment based on business, managerial, scientific, or practical implications of research results. Not dependent on determinations of statistical significance, e.g., statistically significant outcomes may have little decision-making importance; conversely, non-statistically significant outcomes may have highly relevant decision-making value.

(1987), in a discussion of this issue, gives the following example:

"Statistical significance cannot be equated with scientific significance because statistical significance depends on theoretically unimportant factors such as sample size. For example, consider two studies that attempt to reduce cigarette smoking. It is possible for the t statistic for one study to be 8.433, yet the treatment reduces cigarette smoking by two cigarettes. Whereas in second study the t statistic could be only 2.108, yet the program reduces the level of the smoking by 20 cigarettes. This could happen if the first study has 16,000 subjects, the second only 10 subjects...." (p. 211).

For the application of research results to have the greatest impact and value for decision support needs, assessment of research outcomes should therefore not be limited to determinations of statistical significance; consideration should also be given to the "meaningfulness" or practical importance of the outcomes. These two assessment dimensions are summarized in Table 1.

**Assessing meaningful outcomes: effect size statistics**

To effectively assess meaningful outcomes, a metric other than statis-

"strength of an effect as opposed to its p value" (Kenny, 1987). There are several different test statistics for effect size, including:

- d (for measuring the effect size difference between two means)
- h (for measuring the effect size difference between two proportions)
- Fisher's Z (for measuring the association between two continuous variables)

Effect sizes are generally categorized as small (effect size = .2), medium (effect size = .5) and large (effect size = .8), corresponding to correlations of .1, .3, and .5, respectively (Cohen, 1988). Measures of effect size are commonly used in conjunction with significance testing in power analysis (an analytic method of determining how large a sample is needed to detect the effect of an intervention). Effect size is also one of the metrics of meta-analysis (i.e., the statistical integration of results of independent studies).

As noted earlier, an attribute of effect size statistics that distinguishes them from traditional significance tests is that they are not dependent on sample size. That is, the degree of difference or change required to reach a particular effect size remains the same regardless of sample size, while the degree of difference or change required for statistical significance



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**Table 2. Effect Size Calculations**

Statistic	Derivation	Calculation
Effect size for the difference between two means ( $d$ ) (Judd, 1991)	The method for determining the effect size difference between two means ( $d$ ) can be derived from a product moment correlation coefficient, $r$ .	$d = ((4r^2)/(1-r^2))^{1/2}$
Effect size for the differences between two proportions ( $h$ ) (Cohen, 1988)	The method of determining effect size for the difference between two independent proportions ( $h$ ) involves transforming the proportions into standardized values, and taking the difference.	$\theta_1 = 2 \arcsin \sqrt{P_1}$ $\theta_2 = 2 \arcsin \sqrt{P_2}$ $h = \theta_1 - \theta_2$ (directional) $=  \theta_1 - \theta_2 $ (non-directional) (where $P_1$ = proportion 1, $P_2$ = proportion 2, $\theta_1$ = standardized proportion 1, and $\theta_2$ = standardized proportion 2) <sup>3</sup>
Effect size for the association between two continuous variables (Fisher's $Z$ ) (Judd, 1991)	Fisher's $Z$ represents a transformation of $r$ , the product moment correlation coefficient. These transformations are commonly available in statistics textbook tables.	Fisher's $Z = .5 (\log((1+r)/(1-r)))$

increases as sample size decreases. Consider the following hypothetical example of a customer satisfaction survey result:

Sixty percent of respondents answer "Yes" to the question: "Overall, are you satisfied with the

customer service provided by [name of organization]?"

If a quality improvement goal is to increase this percentage at remeasure so that the increase is statistically significant (as measured by a z-test), it would take an increase of 5

percentage points (to 65 percent) for a sample size of 1,000; however, it would take an increase of 19 percentage points (to 79 percent) for a sample size of 50.

In contrast, if a quality improvement goal is to increase this percentage at remeasure so that the increase meets the threshold for a minimum effect size ( $h = .2$ ), the increase needed is 10 percentage points (to 70 percent), whether the sample size is 50 or 1,000.

Therefore, because effect size statistics are not dependent on sample size, and have a consistent measurement interpretation (i.e., small, medium, and large), they can provide a standardized context for interpreting "meaningful" results above and beyond statistical significance testing.

**Effect size calculations**

Calculations for  $d^2$ ,  $h$ , and Fisher's  $Z$  are provided in Table 2. As noted previously, results of each can be

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interpreted as “small” (.2) medium (.5) or large (.8).

### Application

#### Example 1

Health plans use effect size statistics in quality improvement programs, both for goal-setting and for demonstrating improvement and impact of satisfaction-based interventions. Effect size testing has been found to be particularly useful for providing direction in small-sample studies, used in lieu of or in addition to statistical significance testing; this method has been validated and accepted by external accrediting organizations.

For example, the ACME Health Plan conducts an annual managed care member satisfaction telephone survey among a random sample of managed care members. This survey is used both to establish measurement baselines for new quality improvement initiatives and to track effectiveness of ongoing quality interventions.

One such intervention related to member experiences with claims processing. ACME researchers established an intervention goal to maximize the percent of members (based on survey results) who are “satisfied with getting their claims paid for.” However, because this measure could

researchers chose to use effect size testing to set more achievable goals (with the goal set at achieving a reduction that would meet the minimum threshold for a small effect size) and for

	1997 (n=24)	1999 (n=24)	1997 - 1999 Change	
			Statistically significant?	Meets threshold for small effect size?
% satisfied	80%	88%	No	Yes

tracking the impact of interventions.

To illustrate the impact of using effect size for ACME’s goal-setting, the table below presents a comparison of the increase needed from baseline (Year 1) to remeasure (Year 2) to achieve: a) statistical significance, and b) small effect size, in ACME’s claims processing satisfaction rating.

As the table indicates, the percent of members “satisfied with getting claims paid for” would need to increase from 90 percent to 99 percent (an increase of 9 percentage points) for the increase to be statistically significant (for n = 50), but would only need to increase from 90 percent to 96 percent (an increase of 6 percentage points) for the increase to reach the minimum threshold for a small effect size.

At ACME’s survey remeasure point (Year 2), a comparison to the Year 1

annual physician-specific member satisfaction survey among a small random sample of patients for physicians who are being credentialed in the upcoming year (n = 24 respondents per physician). Because of the small sample sizes, using statistical significance testing to trend physician scores over time does not yield actionable information (since such testing is only sensitive to very large

The second and third articles in this three-part series will appear in upcoming issues of *Quirk’s*:

- Consumer confusion about “value” (*Quirk’s* March 2000 advertising research issue): a review of how survey research-based observations of consumers’ conflicting perceptions of the notion of “value” have been used to refine and shape decisions regarding advertising expenditures; the research design used for this type of assessment relies on a simple yet credible “triangulation” on the value concept.
- Impact of health on satisfaction (*Quirk’s* June 2000 health care research issue): an example of an effective approach to segmenting the customer base for refining satisfaction-based initiatives and related resource allocations and decision making; article includes a review of the business value and use in decision making along with discussion of how operational and survey-based data can be integrated to demonstrate the validity and practical nature of customers’ responses on surveys.

Table 3. Claims processing goal-setting—ACME Health Plan

	Baseline (Year 1) (n = 50)	Goal at Remeasure (Year 2) <sup>a</sup>	
		Goal needed to achieve statistical significance (p ≤ .05)	Goal needed to achieve a small effect size (h ≥ .2)
% of members reporting satisfaction with getting their claims paid for:	90%	99%	96%

be tracked only among a subset of survey respondents (i.e., those with claims), the small sample size precluded the use of statistical significance testing for feasible goal-setting and tracking. For example, in order to demonstrate “statistically significant improvement,” an increase of 9 percentage points in those reporting “satisfaction with getting claims paid for” would have been needed. ACME

baseline results demonstrated an increase in the percentage of members reporting “satisfaction with getting claims paid for” that did meet the criteria of a .2 (i.e., small) effect size. Ongoing trending of the data is used to demonstrate sustained improvement.

#### Example 2

ACME Health Plan conducts an




changes). Therefore, effect size testing has been found to be useful in certain instances (i.e., particularly with physicians who may be scoring below-average) to demonstrate performance improvement over time. As an example, Table 4 presents the patient satisfaction ratings for a hypothetical Physician X in 1997 and 1999:

The 8 percentage point increase in Physician X's satisfaction scores (from 80 percent to 88 percent) is not statistically significant, but does meet the minimum threshold for a small effect size. Due to the small sample size, an increase of 18 percentage points (from 80 percent to 98 percent) is required for the increase to be statistically significant.

### Conclusion

This article's review of "effect size" statistical testing tools as a means to demonstrate quality improvement and the impact of customer satisfaction-based interventions illustrates how researchers can effectively leverage these tools for their organizations. However, despite the usefulness of this technique, this article does not mean to suggest that it should replace statistical significance testing in a researcher's arsenal of tools. In addition, you must also consider the challenge of communicating and establishing credibility for this approach among senior management or other organizational end-users who may not be versed in statistical methods.

Likewise, researchers need to continually consider the "real world" business implications regarding whether or not observed differences in the data — even if statistically significant or able to satisfy an effect size threshold — are sufficiently important and actionable for the organization. Relevant and effective decision support always starts with a clear understanding of the likely and possible business scenarios faced by executives. Underlying a researcher's effectiveness and credibility is the ability to understand the environment in which they are intro-

ducing technical tools. 

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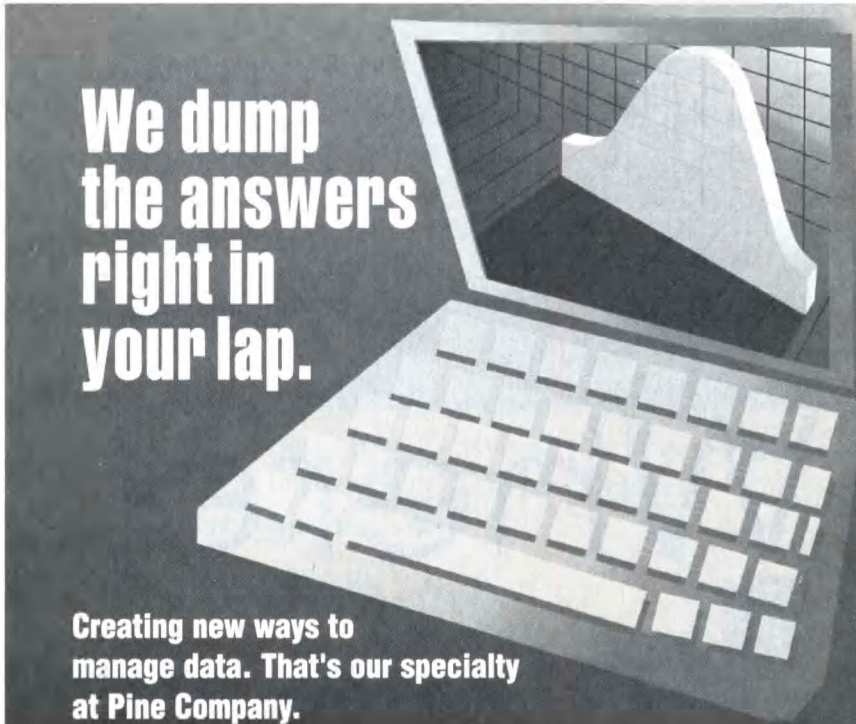
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<sup>1</sup>Although survey research designs typically do not meet all the scientific criteria for inferring a causal relationship between the intervention and the outcome, the probability value of these test statistics (i.e., the statistical significance level or p value) provides protection from Type I errors (i.e., concluding that there is a significant effect when in fact there is not).

<sup>2</sup>For more information about statistical software available to calculate d, check [www.assess.com](http://www.assess.com).

<sup>3</sup>Cohen's textbook (1988) also provides tables with the transformed proportions.

<sup>4</sup>Assumes a sample size at remeasure of 50.



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# Customer satisfaction research:



By Matt Michel

# Where's the beef?

*Editor's note: Matt Michel is vice president of Decision Analyst, an Arlington, Texas, research firm. He can be reached at 800-262-5974 or at mmichel@decisionanalyst.com.*

**F**or several years now, customer satisfaction research has been the rage of corporate America. Everyone wants to know how their company rates with its customers. That's good. What's not so good is the way most companies approach customer satis-

faction research and the end results of their research investment.

Frankly, most customer satisfaction research is wasted. The research is performed. The data are presented. The commandment that improvement will be made comes down from on high. Then, the study goes on a shelf, not to be revisited until the next survey cycle. Nothing really changes. Why?

Unfortunately, most customer satisfaction research fails to pass the "so what?" test. You learn that your customer satisfaction rating is 7.8 on a

10-point scale, or 147 on a customer satisfaction index, or some other statistic. Often, customer satisfaction research cannot even indicate whether your performance is improving or not. If — and it's a big if — you've kept the survey and methodology the same, you still don't know if your satisfaction improved because customers tend to change their expectations. As a rule, expectations rise over time. Performance that was considered good a couple of years ago may cause you to look like a piker today. Everywhere

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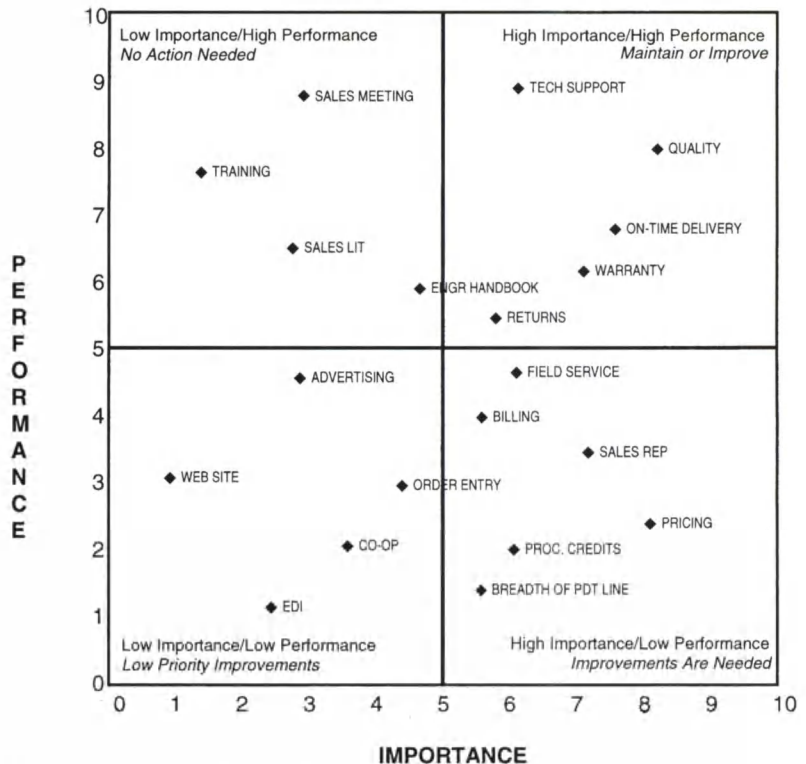
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## QUADRANT ANALYSIS



today, stores are staying open longer, warranties are lengthening, return policies are liberalizing, and so on. You can improve your service and still get left behind. You may get better, but see falling scores!

You get a customer satisfaction rating. . .so what? By itself, it doesn't tell you anything meaningful. It doesn't tell you how to improve or where to improve. It really doesn't even tell you if you've improved. That's why most customer satisfaction studies collect dust. They fail to add value to the business.

Customer satisfaction research is not complicated. Done correctly, it is consistent with the two quality principles of *kaizen* and *iciban*.

*Kaizen* is a Japanese term for continuous improvement. Adherents of *kaizen* make many small, incremental changes on a continuous basis. Customer satisfaction research should support *kaizen*. It should offer direction by revealing where improvement is most warranted and will offer the greatest return. In other words, customer satisfaction should help prioritize a company's improvement program.

*Iciban* is another Japanese term.

Loosely, it means "being the best." Adherents of *iciban* strive for excellence and superiority to others, for pre-eminence. If others improve a little, then the company seeking *iciban* must improve as much or more. Customer satisfaction research should also support *iciban*. It should indicate a company's position relative to other companies for benchmarking purposes. In this way, customer satisfaction research indicates whether your company is improving or falling behind relative to other American icons and suggests which companies merit emulation and further study.

### Kaizen-directed research

*Kaizen*-directed research is really quite simple. Quality guru Phil Crosby described quality as conformance to customer requirements. Satisfaction works the same way. Let the customer tell you what's important and how satisfied they are with your performance. Quantify importance and performance for each definable area of the company as the customer would see it (if the customer does not see it, they cannot rate it). Once importance ratings and satisfaction levels are determined, it becomes simple to prioritize the areas

where the most improvement is needed. This is done through quadrant analysis or factor weighting.

Quadrant analysis is simply a graphical depiction showing all areas of the company plotted according to their importance and performance (see facing page for an example). The field of rating points is then divided into four quadrants: low relative importance/low relative performance, low relative importance/high relative performance, high relative importance/low relative performance, high relative importance/high relative performance. The last quadrant (high relative importance/low relative performance) is the "opportunity quadrant." Here you stand to gain the most from improvements.

In a quadrant analysis, all of the importance and performance (i.e., satisfaction) measurements are made relative to each other. This makes the prioritization possible that will transform the research into a diagnostic tool that adds value.

Factor weighting is similar in approach and results to quadrant analysis. With factor weighting, the performance measures are weighted by their importance. There are an infinite number of approaches to factor weighting. Some are relatively simple and involve little more than multiplying each performance measure by the importance measure. Others use statistical techniques, such as factor analysis or other types of regression to determine the proper weighting scheme. In the end, factor weighting results in adjusted performance measures that reveal where you should focus your improvement efforts.

Using either a graphical technique like quadrant analysis or a numerical technique like factor weighting should yield a prioritized list of areas for improvement. It highlights the areas where a performance improvement will have the most impact on overall customer satisfaction. Now that's something managers can start to act on. That's of real value.

#### Acting on the data

Usually, managers can explain why

a particular area rises to the top of the list. Of course, this begs the question: If a manager knows an area suffers from a performance deficiency, why hasn't he or she done anything about it? Sometimes it's because there has not been the organizational will or support to make the changes necessary for improvement. In other words, the pain of making changes is perceived to be greater than the benefit. In these cases, customer satisfaction research might reveal that the benefits are

greater than previously believed, leading to positive change.

Other times, there is a dispute about whether the changes are really needed in an area. This usually results when managers believe that only one or two complainers are disgruntled with the performance because they don't hear from anyone else. If the research makes it apparent that more than a small minority of customers are unhappy, it can shock the company out of complacency.

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Finally, the corporate emphasis is sometimes in the wrong areas. This is the reverse of the previous case. Instead of being ignored, one or two complaining customers are vocal enough and have the right ear, to the extent that they are able to shift an entire company's strategy towards resolving their pet problems. If the research shows that most customers are fairly satisfied with current performance or that the area in question is not that important in the larger scheme of things, the company finds itself free to redirect resources where a real impact can be made.

While managers can usually cite the reasons customers identify an area as needing performance improvement, there are occasions when managers do not know, or more typically, do not agree, why a specific area needs improvement. When this happens, in-depth follow up research is warranted. The follow-up work may consist of little more than customer focus groups or it may necessitate a rigorous quantitative study. The right research methodology depends upon the particulars of the specific situation.

#### A moving target

A satisfaction study in any given year is, of course, merely a snapshot. Performing research on a consistent basis adds a time element. Many companies conduct annual satisfaction assessments. The annual reviews help companies keep their priorities in tune with the market. This is important because customer satisfaction is a moving target.

Satisfaction research is not a "sometimes" thing. Companies need to periodically reassess their performance, because performance changes, customer expectations change, and importance ratings change over time. This year's hot button may be replaced next year as performance and requirements change. It's easy to imagine, for example, how a company could perform satisfaction research and determine very little need for improvement in EDI (electronic data interchange). Then, in the space of a year or less, they find their customers

have shifted on them, as more and more companies become comfortable with the Internet, or as a related supplier sets a new standard. Satisfaction research should be repeated annually at least.

Sometimes it is simply not appropriate to wait a full year to conduct satisfaction research. For some companies, a year is an eternity. Typically, these organizations operate in fluid markets where change occurs rapidly. Waiting a year entails the risk of missing a market shift. When the changes are identified, the company is no longer in front of the trend and must engage in recovery procedures. In a turbulent industry, they may never catch up. Thus, they engage in ongoing tracking to plot trends on a monthly or, in a few cases, weekly basis. This allows them to see a shift in expectations or a hit in performance at an early stage when diagnostic efforts can determine the source of the change in time to develop countermeasures before too much slippage occurs.

Satisfaction tracking should not replace the annual review. This is because satisfaction tracking centers on a few key indicators to maintain executional speed and to remain affordable. The annual study generates in-depth analysis that helps direct improvement efforts on a broad scale.

#### Iciban-directed research

Customer satisfaction research that only supports the principle of kaizen points the way, but does not reveal the distance a company must travel. In other words, kaizen-directed research shows where improvement efforts should be directed, but does not reveal how well a company is performing. There is no benchmark for comparisons. To support the concept of iciban, or being the best, companies need to know how far they must travel. They need the ability to compare themselves to others. In short, they need benchmarks.

Benchmarking can occur in three ways. The first is to benchmark against direct competitors. The second is to benchmark against noncompeti-

tive companies who also supply your customer base. The third is benchmarking against leading corporations who may or may not share your customer base.

- Comparisons with direct competitors. During a customer satisfaction study, it is easy to benchmark against the competition if customers use two or more suppliers of a product. If they do not, it may be necessary to construct a parallel research study of competitors' customers. Ideally, of course, the respondents in the study would have direct experience with you and with your competition.

- Comparisons with non-competitive suppliers to your customer base. Any supplier to a company's customer base is a potential benchmark candidate. Sometimes noncompetitive suppliers to your customers provide a more relevant measuring stick than your direct competitors. For example, you may offer the best technical support in your industry and still be perceived as a poor performer because your entire industry underperforms. Remember, your customers only know what they experience. They might see superior technical support coming from suppliers in other industries and may not be intimate enough with your competitors to know that you offer the best in your industry. You can offer the best technical support in your field and still lose customers, if the issue is important enough to them. They may change suppliers assuming everyone is better than you. All they know is what they experience with other suppliers, from other industries, all of which might exceed your performance.

Furthermore, identifying noncompetitive suppliers who excel in specific areas is often more useful than identifying your strengths and weaknesses vis-à-vis direct competitors. A noncompetitive supplier is more likely to perform a quid pro quo where your people examine the areas where they excel in return for letting their people examine an area of your company that interests them.

- Comparisons with leading American corporations. Finally, it is

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also possible to determine how a company stacks up against a number of leading U.S. corporations by constructing a satisfaction index that is comparable with the American Customer Satisfaction Index (ACSI), developed by the University of Michigan. Since Michigan's methodology is public domain, it is possible to design a customer satisfaction study in such a manner as to allow a company to be able to compare its performance with such household names as Nordstrom, Federal Express, Southwest Airlines, Wal-Mart, and even the U.S. Postal Service.

Because an ACSI type of rating is of the total company, it does not result in the in-depth, department-level metrics that allow managers to understand why and where a company might outperform them. Nevertheless, many companies find it valuable. It gives managers and employees an easily understood reference point for evaluating their performance.

A comparison to the index helps companies understand whether they are making gains over time relative to other leading corporations. Remember, satisfaction is a moving target. Consumer expectations are not stagnant; neither is corporate performance. Your company may show a year-to-year gain in performance only to discover that your relative position amid the leading U.S. corporations slipped because you weren't improving fast enough.

Conversely, consumers may be crankier and more demanding, giving lower ratings across the board. In this environment, heroic efforts to improve may only maintain last year's satisfaction rating. In isolation, this can be very demoralizing. Viewed in the context of a broad downward movement in the satisfaction rankings of other leading companies, it may be seen as a victory.


**Kaizen- and iciban-directed research down the distribution channel**

Satisfaction research can support kaizen and iciban best when it focuses on the next step in the distribution channel. With each successive step in

the channel, the respondents are further and further removed from the company. Simply stated, there are fewer opportunities for the company to touch the customer. Managers should be aware that any down-channel research becomes a de facto evaluation of the distribution step immediately preceding the responding company, as well as an evaluation of the things your company does that directly touch the respondent. This can be valuable in helping the channel improve, but it will not provide an unvarnished view of corporate performance and has limited diagnostic value.

So how can a company evaluate end-user satisfaction for the purposes of continuous improvement and becoming the best? Often the best choice is a form of product testing. Product testing in reality is a narrow form of satisfaction research. It deals with the key aspects of the product that an end user can assess and a company can change. Done correctly, product testing will yield the diagnostic attributes of satisfaction research, though limited to the product itself. It can also provide benchmarking against related products; the product does not need to be from the same category, but it must be related.

**Truly valuable**

Customer satisfaction research is important. However, it is often not useful due to flawed approaches and methodologies. To be truly valuable, satisfaction research must identify the areas where corporate resources can be allocated to stimulate the greatest overall return from performance improvements, supporting kaizen, or continuous improvement. It must also identify how well a company performs relative to others, supporting iciban, or being the best. Companies should be wary of trying to attempt satisfaction research too far down the distribution channel and, instead, consider shifting to product testing to measure end-user satisfaction. Finally, satisfaction research that meets these requirements can provide real value to its sponsor, but only if it's acted upon. 



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# Customer satisfaction:

## Numbers don't tell the whole story

By Jim Jubelirer

*Editor's note: Jim Jubelirer is vice president, Burke Customer Satisfaction Associates, Chapel Hill, N.C. He can be reached at 919-969-7818 or at jubelire@burke.com.*

**M**ost companies know that in today's booming economy, it's a customer's world. Customers have more access to more product information and more choices of where to obtain products than ever before. Companies are trying to stay ahead of their customers by understanding their needs and providing quality service at a price that doesn't compromise financial results.

To make the situation more complex, leading management thinkers have articulated new concepts such as one-to-one marketing, customer loyalty, customer learning, knowledge management, customer relationship

management, mass customization and permission marketing. It is easy to feel confused today!

### **Why customer intimacy matters**

Customer intimacy is based on knowledge. If you are a business-to-business supplier, it means getting to know the inner workings of your largest accounts. For consumer products companies it means understanding the needs and desires of individual consumers and the segments they represent.

Companies have more competition than ever, which makes purchasing decisions more complex and stressful. On the flip side, people have less time, less patience and less flexibility in dealing with mistakes. This "more and less" equation results in an increased demand on businesses. This increased need seems unfair and

unrealistic — it is not always in the best interest of companies to respond to these demands.

What?! Not respond to a customer's needs? *The Wall Street Journal* recently cited the American Customer Satisfaction Index (ACSI) study, a quarterly survey conducted by the National Quality Research Center at the University of Michigan. The study reported that as customer satisfaction increases, business results improve. Research has shown a positive relationship between measures of customer loyalty and financial outcomes.

However, numbers don't tell the whole story. For example, take computer companies. PCs are a commodity dropping in price every day. With more consumers buying computers, there is an increased demand for technical support, which is expensive to



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provide. So if a computer company is exceeding its customers' needs for technical support, it is probably spending too much on technical support. Bottom line: Just because customers want it doesn't mean it's good for business.

Take this test: When was the last time a customer called and asked how profitable you were last quarter?

Many companies understand that managing relationships with their customers leads to a competitive advantage and a sharper company focus. Therefore, it is necessary to "fire" unprofitable customers or customers whose expectations are not consistent with your philosophy and strategy.

### Numbers don't tell the whole story

Once an organization has made a real commitment to get closer to its customers, how does it go about achieving this intimacy? Companies striving to achieve customer intimacy would be best served by developing an integrated architecture. This method allows organizations to:

- capture and analyze inbound customer comments and complaints;
- use qualitative and quantitative methods;
- link relationships/products/processes with transactional or event surveys;
- link customer and employee metrics to internal tactics and financial results.

An integrated architecture combines inbound, unsolicited information, and outbound solicited market research. It is necessary to use multiple methods to understand the complexities of the marketplace.

### Inbound methods

Inbound methods require that the customer initiate contact with the company. This feedback is usually based on customer problems and is not representative of the true picture. However, inbound methods are an opportunity to respond to and recover from these issues.

Inbound methods also can be dri-

ven by the employee. Therefore, employees play a vital role in the integrated architecture. It is best to look not only at how unsolicited feedback is gathered about an organization's products/services, but also the relationships that are driven by customers and employees. Oftentimes consumers complain to customer service representatives or take the complaint one step further and write "Letters to the President." All of this feedback should be taken into consideration. In addition, employees have an opportunity to share customer feedback at internal management forums or regular staff meetings.

Now that all the inbound information has been collected, what does a company focus on first when conducting outbound market research? For starters, consider the customer life cycle. Over the course of the service an organization provides to a customer or the product it offers, there are seven distinct phases that need to be explored.

- Choosing. How do customers get information on an organization's products/services and how do they choose them?
- Ordering. How do customers acquire an organization's products/services?
- Installing. What must customers do to get work done after receiving an organization's products/services?
- Learning. What does it take for an organization's customers to become proficient with its products/services?
- Using. How productive and effective are an organization's customers once they know its products/services?
- Supporting. How do an organization's customers keep its products/services up to date and running?
- Repurchasing. How do an organization's customers recycle/dispose of its products and upgrade or repurchase?

Many companies know the criteria by which customers first purchased its products/services. However, do they know why a person considers

repurchasing? It may be quite different than the criteria used in the initial purchase decision. It is common for sales-driven companies to focus on the choosing and ordering phases, while an engineering-driven company may focus on use and support. Rarely do companies gather extensive customer data about every phase in the customer life cycle. Therefore, it is necessary to use both inbound and outbound methods to gather meaningful feedback across the entire customer life cycle.

#### **Outbound methods**

Outbound methods include both qualitative and quantitative processes. Unlike inbound methods, outbound methods are all driven by the company and can be implemented on a product/service level and on a relationship level with the consumer.

— *Outbound qualitative methods.* Outbound qualitative methods include focus groups, site visits (used to understand the requirements and needs of specific individual customers), executive interviews and employee roundtables — useful for understanding the perspective of front-line workers. In addition, observational research is another method that many large consumer companies are using. For example, Hewlett-Packard engineers observe the “out of the box” experience of installing new hardware and software at customers’ homes.

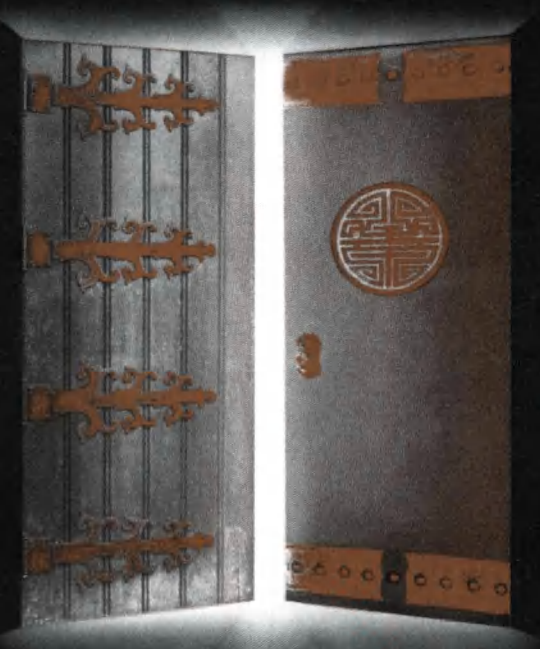
Due to the complexity and variety of qualitative responses, companies typically do not analyze qualitative information in a rigorous manner. However, new software tools allow for content analysis of text files to identify themes and patterns.

Because companies are usually looking for that single number that tells them how they are doing and what they should focus on, quantitative research also is needed to validate the directional information captured from qualitative research.

— *Outbound quantitative methods.* There are several quantitative methods that companies can utilize —



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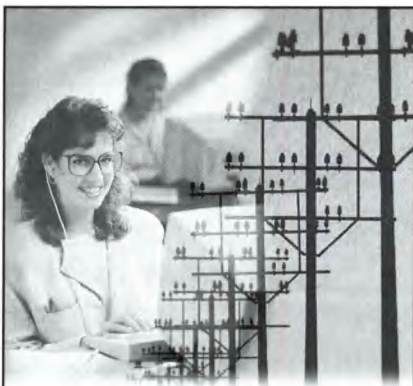
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ranging from surveys to third-party consortiums. Relationship surveys address issues regarding satisfaction with sales, products, services, etc. Transactional (event-based) surveys are usually a follow-up to a company/consumer interaction. For example, when you take your car in to get serviced, you may receive a survey in the mail several days later asking about your experience. Market level or benchmarking surveys usually involve all customers in a particular product category. The sponsor of the study is not identified and the focus of the study is on several companies within a particular product/service category industry. Syndicated research/third-party consortiums, like J.D. Power & Associates, conduct their own product/service or industry research and then sell the findings to those companies of interest. In addition, there are third-party consortiums like the ACSI that conduct research across many industries.

In order to utilize the results of quantitative processes, it's important to implement a monitoring program — repeating the surveys with valid sample sizes and meaningful analysis. Many companies make potentially erroneous management decisions because of poor research — usually due to an insufficient number of samples.

If you look at virtually any winner of a quality award (such as Malcolm Baldrige National Quality Award), you'll find that these companies have extensive customer surveys and a closed-loop process to ensure accountability.

Without a closed-loop process to make sure that changes are made, many measurement programs fail to meet their objectives. The largest shortcomings usually occur because managers don't hold employees responsible for making changes, or because the company is distracted by too many other initiatives. It is critical that all employees agree with, and then act on, collective decisions.

For example, one company was known for its "company nod." When

a decision was being made in a meeting, all employees would nod their head yes, then they would go back to their desk and shake their heads no. That company, once a leader in its industry, is no longer in business.

### Linking relationships with transactions

There are several opportunities for an organization to survey its consumers — on a macro and micro level. Calendar surveys, also known as relationship surveys, are triggered by a passage of time (e.g., distributed quarterly or annually) and usually cover the business's entire line of products and services. These surveys are used to establish target issues to improve customer loyalty.

Event surveys are triggered by a specific service event, like a call to a help desk. The survey is focused on the specific event and transaction. These surveys are then linked to target issues identified by the calendar surveys.

Dashboards are individual customer specific surveys. The company supplier provides the customer with a results report — jointly agreed upon measures and frequency. For example, each quarter a supplier like GE Light Bulbs sends a report to a customer like Home Depot and details what percentage of shipments to Home Depot were partial or full.

### Linking customers, employees and financial performance

Because the investment in a customer relationship management program is so great, it's critical to demonstrate to senior management the value of the program and how it is linked to employee commitment and financial performance.

Studies have shown that employee satisfaction is a strong predictor of employee retention, which in turn is a good predictor of customer satisfaction.

Many clients also have validated the link between customer survey scores and financial results. For instance, a health insurance company

found that 100 percent of its customers who were classified as "at risk" from their customer loyalty tracking program did not renew their contracts when they expired.

For a large commercial bank, Burke conducted surveys with customers from more than 1,000 branches and with thousands of employees. This data formed the basis of a modeling project. The highest correlations between employee responses and customer loyalty were found in four primary areas:

- the organization's customer service commitment;
- having effective processes that empower employees to deliver service;
- providing adequate training and processes to deliver quality service; and
- adequately rewarding employees for their contributions.

Another aspect of the modeling project was to correlate individual bank branch profitability with a measure of customer loyalty called the Secure Customer Index (SCI). The branches with the greatest profitability also had the highest SCI scores.

This type of validation can provide the burden of proof that management needs to maintain the financial and emotional commitment to an ongoing customer loyalty-tracking program.

### Not a true picture

Too many companies rely only on unsolicited feedback such as comment cards and therefore do not have a true picture of their performance in the marketplace. Genuine customer-intimate companies have a competitive advantage by focusing on the vital few issues that matter most to key customers or segments. Qualitative methods can provide insight and direction into key customer requirements and marketplace trends. Rigorous surveys also are essential to validate performance and provide a sound basis for decision-making. Market research alone, however, does not lead to action. A closed-loop process to ensure accountability is critical. **TM**

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By Howard Waddell

*Editor's note: Howard Waddell is president of Decision Resource, Inc., a Miami, Fla., research firm. He can be reached at 800-544-2115 or at HWADDELL@prodigy.net.*

**O**ften, after a customer satisfaction survey has been completed, organizations don't know what to do with the information that has been collected. If a product or service attribute is rated "good," how much worse is it than another rated "excellent"? If your customers wait in line for service for

15 minutes rather than an expected 20 minutes, should you be content when they tell you the wait was "better than expected"?

There are several rating scales that are routinely used for customer satisfaction measurement (CSM). Unfortunately, most have significant weaknesses when used in practical situations.

#### **Performance scales**

Performance scales allow customers to rate product or service attributes

with choices that might include superior, excellent, good, fair, and poor. With a scale such as this, "good" certainly doesn't look very good at all. Even "excellent" is something less than "superior." What is one to make of data that comes from a scale that suggests that excellent is not good enough?

Experience with performance scales has also shown that many customers tend to be overly generous in their evaluations of products and services. This positive response bias is most



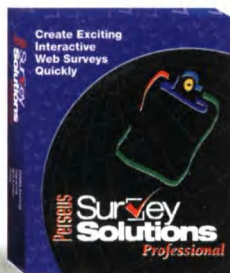
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likely when customers know they have no anonymity or when they perceive that a well-meaning employee's raise or job may be on the line. When positive response bias exists, average scores tend to be high and problem areas may not be clearly identified. This becomes only too clear when customers switch to a competitor's product soon after reporting that a product was "excellent" in every way.

#### Satisfaction scales

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indicate how satisfied he or she is with the various attributes of a product or service. Questionnaire choices might include very satisfied, somewhat satisfied, neither satisfied nor dissatisfied, somewhat dissatisfied, and very dissatisfied. Like the performance scale, this scale lends itself to positive response bias. Furthermore, if the rating scale has no neutral position, forcing those who are neutral to take a position artificially, customers will, more often than not, take the more positive position, compounding the positive bias.

#### Expectations scale

One of the major cruise lines apparently borrowed directly from its research reports when it began using the advertising slogan "Exceeding Expectations." If my expectation is that I will get seasick, what is their slogan telling me?

The expectations scale allows customers to evaluate product and service attributes with such phrases as "much better than expected," "better than expected," "about as expected," "worse than expected," and "much worse than expected." The problem is that these responses are simply devoid of meaning unless the expectations are also known. If the expectations are known, then the volume of data that must be digested before meaningful conclusions can be drawn may have increased by a factor of two or more. And when expectations are negative (think airline food), what conclusions can be drawn from a "better than expected" rating? Does it mean the customer is happy? Maybe, maybe not.

The expectations scale can also confuse rather than enlighten when the mix of new to old customers changes. The expectations of these two groups can be very different. The new customer may have expectations that are not realistic. The established customer knows exactly what to expect. Should these two groups legitimately be consolidated? If not, how does one easily compare the responses of the two groups?

The expectations scale presents one other problem. When ratings change over time, it is difficult to know

whether performance has changed, expectations have changed, or they both have changed. What is a product manager to do if his or her performance evaluation is in any way driven by customer satisfaction ratings based on this scale?

#### Requirements scales

There are two different types of requirements scales. In the first, the customer has choices that might include "exceeded my requirements," "met my requirements," "nearly met my requirements," and "failed to meet my requirements." This scale does not work well for attributes such as billing accuracy or product taste that might never exceed customer requirements. Furthermore, this scale is not particularly suitable for evaluating levels of performance that are subject to variability such as employee courtesy or in-stock inventory.

The other requirements scale gives customers choices such as "always meets my requirements," "usually meets my requirements," "occasionally meets my requirements," "rarely meets my requirements," and "never meets my requirements." While this scale is suitable for attributes that are variable, it doesn't make sense for attributes that are fixed, such as the number of service locations or the size of a gas tank.

#### A better scale

In addition to the individual weaknesses of the rating scales that have been discussed so far, they all have one common weakness. None of them tell the business manager, "Here's what you need to improve." One can only infer from the customers' answers what corrective action they feel is required. The process of making deductions about the customers' responses can be avoided altogether if the customers are asked in a more straightforward manner, "What do I need to improve?" The answer to this question leaves much less room for interpretation.

While there may be a variety of ways of asking what needs to be improved, the method that has been used by our firm over the past several years is quite simple and has worked very well. It is also a method that has been gaining

some popularity in both the business and academic communities.

The method can best be illustrated by example. In a recently completed survey for an electronics parts distributor, customers were asked the following question: "For each of the service factors listed below, please indicate how much improvement, if any, you feel is needed by [company name]." Twenty-eight service attributes were listed on the questionnaire, and for each the choices were "no improvement needed," "some improvement needed," and "considerable improvement needed."

This "improvement needed" scale offers numerous advantages.

- Most important, the scale elicits responses that do not require interpretation by management. The answers are not ambiguous.

- It is simple for the customer to understand. He or she is not required to interpret what responses such as "satisfied" and "very satisfied" might mean.

- It is simple for the customer to use. With three easily understood choices,

the customer can move through the questionnaire quickly, avoiding fatigue and irritability.

- It does not invite charitable responses. In fact, our experience (and the experience of others who use this scale) indicates that it invites a high level of candor. Rare is the customer who says "no improvement needed" to all or even most of the attributes being evaluated. In the recently completed survey for the electronics parts wholesaler, a company whose customers are very loyal, the distribution of combined responses for all attributes listed in the "improvement needed" question was as follows: 57 percent — no improvement needed; 33 percent — some improvement needed; and 10 percent — considerable improvement needed. For one of the attributes, 27 percent of the customers said considerable improvement was needed. There was no mistaking what the message here was.

- It fits a wide variety of product and service attributes, including those that are subject to variability, those that are not subject to variability, and those for which performance cannot exceed

requirements. The one weakness it shares with the other scales discussed here is that it cannot identify if a repeated activity, such as catalog distribution or billing, should be done more often or less often.

- It does not have the numerous shortcomings of the expectations scale (i.e., that scale's inadequacies in evaluating performance relative to low or unknown expectations, changing expectations, or different levels of expectation within the customer base.)

- Finally, for the reasons just cited, the scale is ideal for employee satisfaction measurement surveys as well.

### More straightforward

With the traditional scales used for customer satisfaction measurement, the business manager is only getting an indirect and, perhaps, ambiguous answer to the question: "What aspects of my product or service are most in need of improvement?" The way to find the answer to that question is to ask it in a more straightforward way. The "improvement needed" scale allows him or her to do that. **79**



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Are you collecting **too** much information in your 'voice of the customer' process?

## How to **spend less** and **increase value**

By Colleen Bush, John Goodman, and Eden Segal

*Editor's note: John Goodman is president of TARP, an Arlington, Va., research firm. Colleen Bush is a measurement manager and Eden Segal is a customer service training specialist at the firm. They can be reached at 703-524-1456 or at their respective e-mail addresses (jgoodman@tarp.com, cbush@tarp.com, and esegal@tarp.com).*

How can an organization go wrong once it has established the basic infrastructure that lays the foundation for a successful voice of the customer (VOC) process? In TARP's experience the pitfalls of the VOC process do not end once the foundation is in place. In many cases, TARP has found that the research process is misguided and not efficiently designed. This often results in frustration internally and a waste of a company's limited financial resources.

This article builds on a previous article<sup>1</sup> that outlined some of the many obstacles TARP has identified from customer satisfaction research assessments and from conducting strategic customer retention studies and tracking systems in 600+ companies over the past 20 years.

TARP has found that, in general, organizations are collecting a greater quantity of data than they can adequately process and use. This usually stems from fundamental shortcomings in the design of the VOC process:

1. Data collection efforts are not sup-

ported with sufficient planning, analysis, and translation functions to act on the information collected.

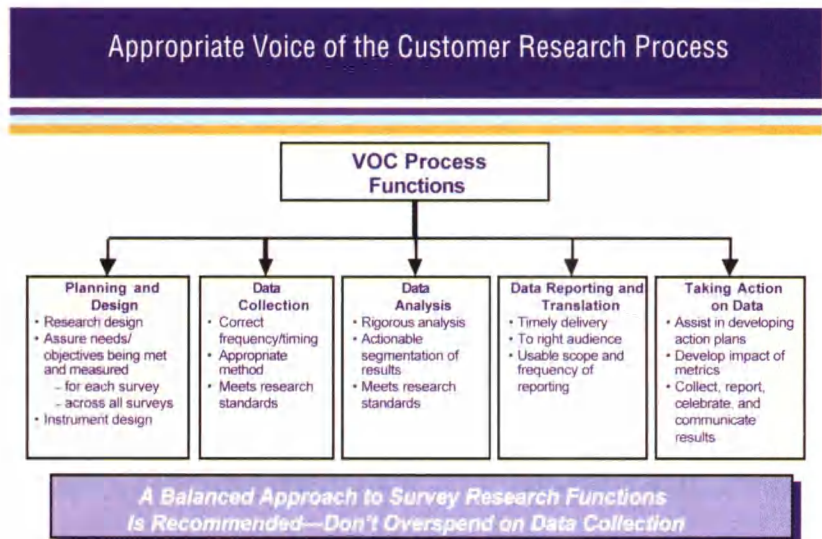
2. Focused objectives are not set to accomplish specific information needs in advance of the research effort.

The result can be a hefty budget for a VOC process that adds marginal value to the organization, positioning it as a prime target when budget cutters are looking for areas to reduce or eliminate costs. However, with proper attention and realignment, a VOC process can be a valuable tool for decision-making within an organization and can offer assistance in pinpointing areas to invest in wisely, in retaining customers, and adding value to the financial bottom-line.

### Millions for collection and pennies for dissemination of results

In taking a step closer and working with clients interested in "fixing" their VOC process, TARP has found that all too often organizations are collecting much more information than they can process and use. Time and again, we have seen too much emphasis placed on collecting the survey data and not enough on the allocation of resources to other important research functions that are part of the VOC research process. Fig. 1 below outlines five basic functions that should be part of every VOC research process.

Even though data collection is only one of the five basic functions in the



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VOC process, many organizations don't devote the required amount of time and resources before or after the data is collected. For instance, month after month, survey data is collected with minimal time and effort allocated to understanding exactly what customers are saying and then integrating the findings into actionable information for decision making. In order to make the data useful, time and effort must be spent on making sense of the data, analyzing and reporting it to the prospective users of the data in an effective manner, and lastly, help-

ing users to take that final step — acting on the data. Unless the VOC process reaches this final stage, the data collected will be interesting at best and even frustrating for the individuals who receive the reports but don't know how to use the information.

**Not separating strategic, tactical tracking of progress, and market research**

Further, TARP has found that one of the root causes behind some of the overspending on data collection is that lengthy questionnaires are being employed on a routine basis to collect a range of information to meet countless organizational objectives, which may be better served using a separate initiative. Fig. 2 outlines three types of survey research, each of which has distinct objectives and serves different needs within an organization.

The first box in Fig. 2, "Strategic Baseline" research, should be used by an organization to identify the basic issues and problems that customers are experiencing, the product and service attributes that are most important to customers (key drivers) and to quantify and prioritize what needs to be

key issues can be isolated from the not-so-important issues.

TARP recommends that strategic baseline research be conducted once every one to three years. The frequency of repeating the survey should be based on the dynamics of the marketplace that the organization operates in, its ability to mobilize and make changes using the research outcomes, and the customers' perceptions of the corrective actions that have been taken as a result of their feedback. One mistake that many organizations make is using a lengthy questionnaire to collect the same information month after month. Consumer needs and motivators are not likely to change on a monthly basis. It would be more efficient to collect this detailed information less frequently, analyze the data and report the findings and their impacts thoroughly, and then help research users develop action plans to improve the key product and service attributes most in need of improvement.

The second box in Fig. 2 is "Tracking." The task at hand now is to track and measure the success of the action plans that have been put into place as a result of the strategic baseline

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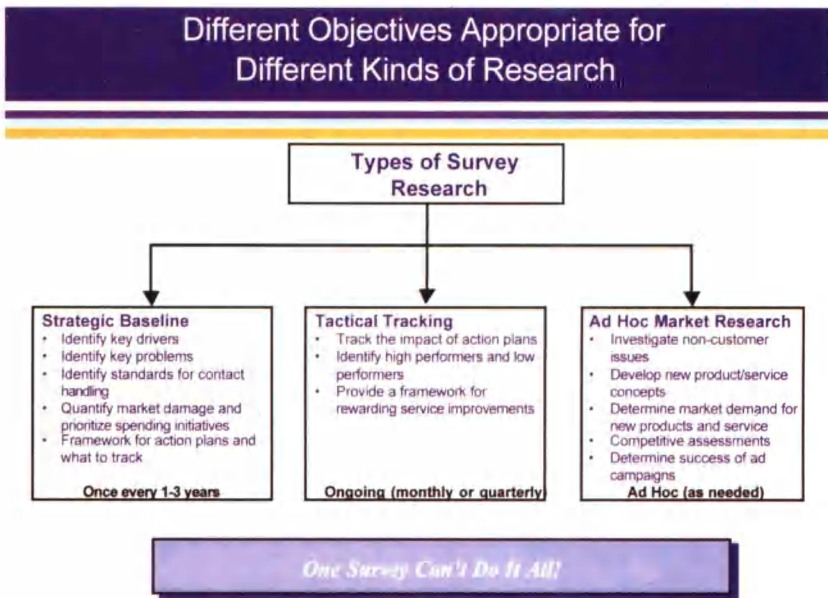
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improved in order to maximize customer satisfaction, customer retention, and foster positive word-of-mouth communication in the marketplace. The survey instrument for strategic baseline research is by nature relatively lengthy because there are many variables that must be looked at before the

research already conducted. TARP recommends that tracking be conducted using an abbreviated survey instrument which measures only the key drivers identified in the strategic baseline research and several overall satisfaction metrics (e.g., overall satisfaction, as well as likelihood to continue using

the product/service, and likelihood to recommend to others, both measures of customer loyalty). This short survey, ideally one page and no more than two, should be conducted on an ongoing basis (monthly or quarterly) and should be used to monitor the success or failure of the action plans that have been deployed. The resulting data can also be used as a leading indicator to identify potential problem areas that may be brewing.

A major waste of resources is doing tracking without prior identification of key drivers and points of pain. One hotel chain used a four-page tacking survey measuring almost 100 dimensions including satisfaction with the decor of the breakfast room. The color of the wallpaper at 7 a.m. is hardly a key driver of loyalty. The rush to track, and lack of discipline in limiting dimensions to track, inevitably result in an overly lengthy survey, lower response rate, and wasted processing costs.

The third box in Fig. 2 is "Ad Hoc Market Research." The main objective of ad hoc market research is to get new customers. VOC research is designed to help organizations keep a pulse on the satisfaction levels of their current customers in order to increase customer retention and customer loyalty. A common mistake many organizations make is combining VOC research objectives with ad hoc research objectives and trying to collect the data to fulfill both research objectives with one survey instrument.

Organizations are often tempted to use the same survey instrument to gather all of the information that they are interested in obtaining using a single questionnaire. While this may be done under the guise of saving money by collecting it all at one time, it actually leads to inefficiencies. This practice results in respondents having to complete long questionnaires which are usually perceived as neither very focused nor user-friendly. Moreover, an unfocused, lengthy questionnaire generally results in lower response rates which in turn lead to higher data collection expenses because more questionnaires must be fielded to yield a completed return. With these facts in mind, it is clear why ad hoc market research objectives should be coordinated and conducted separately from the VOC process as a separate data col-

lection effort at targeted times on an ad hoc (as needed) basis.

### Surveying when other data sources would be better

Another cause of overspending in organizations stems from the practice of using survey data when, in fact, other internal data sources might provide more timely and accurate information but are often erroneously viewed as being academically and analytically unacceptable. Such data sources may include complaint data or other internal

metrics that organizations collect and, unfortunately, never capitalize on. For example, if a car is not repaired correctly, there is a high probability that a customer will file a complaint. And why would an airline conduct a survey to ask customers if the flight was on time when they can access the same information with more accuracy using the internal arrival data?

Complaint data must be calibrated occasionally using survey data (e.g., 40 percent of incorrect repairs result in a complaint and 10 percent of dropped

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
cell phone calls result in a complaint). Calibration helps an organization extrapolate the number of complaints received to a rough estimate of the incidence of repairs or dropped calls in their customer base. The advantage to using this alternative data is that it has already been collected and is often much more timely than survey results. For a phone company or home service company, (e.g., pest control) complaint data can actually be used as a leading indicator of dissatisfaction.

If the VOC manager thinks creatively, costs can be reduced by identifying alternative data sources for examining many types of customer issues.

### **Reallocating a VOC budget**

A share of the resources saved from collecting less information on an ongoing basis and utilizing secondary data sources should be reinvested in the other four functions of the VOC research process described earlier and illustrated in Fig. 1. Customers can tell you what their needs are and what needs fixing, but they can't tell you how to fix it or how to re-engineer your processes, products, and services. A good deal of thought and energy must go into analyzing and interpreting the data once it is collected. And instrumental to the whole process is adequate planning and design to make sure that the research goals and objectives are achieved.

Research users should be regularly trained and updated by effective communicators to help them understand the implications of the data, how to conduct root cause analysis, and how to translate the information into actionable plans. Users and translators should meet continuously to discuss and act on the data.

In summary, although data collection is but one stage in the VOC survey process, it is often the one that gets a disproportionate share of available resources. Realigning these resources across all five research functions should result in organizations spending their limited dollars more wisely and on programs that, in the final analysis, facilitate higher levels of customer satisfaction, retention and loyalty. 

<sup>1</sup>John Goodman and Colleen Bush, "Voice of the Customer' Disconnects Still Exist in Most Companies", *Quirk's Marketing Research Review*, January 1999, pp. 18-31.



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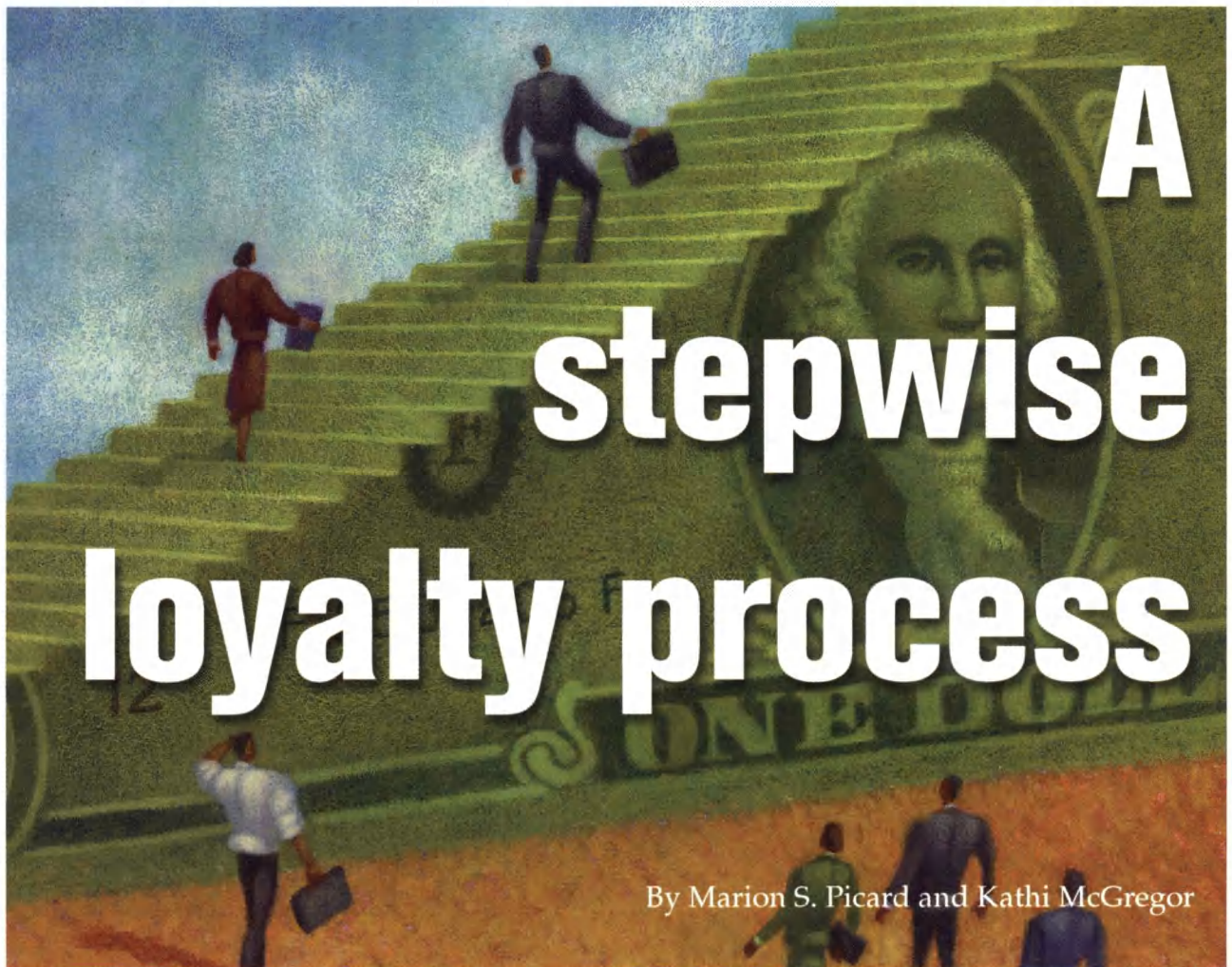
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# A stepwise loyalty process

By Marion S. Picard and Kathi McGregor

*Editor's note: Marion Smith Picard is a senior research analyst, and Kathi McGregor is COO, at Service Strategies International, a Dallas, Texas, research firm. They can be reached at 800-344-6069 or at mpicard@servstrat.com or kmcgregor@servstrat.com.*

**T**he opportunity to develop loyalty-based customer relationships begins with the first transaction between the customer and a company. Whether the transaction takes place in-person, via the Internet or through a call center, the quality of that first experience can set the



tone for the duration of the relationship. As a result, it is very important to recognize that the first impression many customers get of your company is created by some of your lowest-paid employees. To enhance the opportunity to satisfy customers and obtain repeat business, it is important to ensure employees responsible for customer interface are well-trained and understand the company's mission.

**T**o assess the success of the first time you touch a customer, it is important to have a record of every transaction. Many companies capture transaction-based information only in the form of sales records. Other companies, depending on the nature of the sale, capture extensive data including demographics and/or firmographics. The more valuable an individual transaction (or customer) is, the more

important it becomes to be able to assess the value of a transaction. The company's goal for each customer interaction is to provide the customer an experience that is more valuable to them than just the product or service purchased, and at an internal cost to the company that is less than the price paid.

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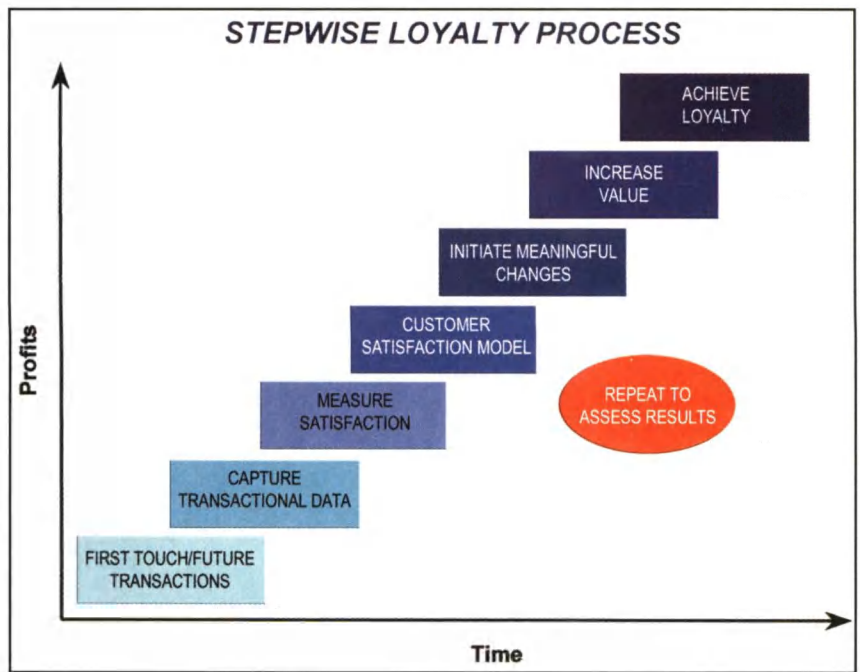
- How do you continually create service value for customers, and earn their loyalty?

An important component of a quality-driven company's loyalty-building process is to measure customer satisfaction.

## Step 3 Measure satisfaction

Talking to customers about how transactions are handled, problems are resolved, and questions are answered will provide direction on what improvements can be made that will positively impact your relationships.

Measuring satisfaction on individual attributes can be followed by another key component of



the loyalty-building process, the modeling step. Customer satisfaction models help explain the interaction of product and service characteristics with customer's expectations and can quantify the impact of demographic, environmental, and lifestyle factors

on expectations and perceived value. The model also can help quantify the impact of different characteristics, to facilitate a company's ability to make process changes that are meaningful to consumers.

Measuring satisfaction on individual attributes can be followed by another key component of

A customer satisfaction model helps identify the relationships in the data that are not visible with simple reporting such as percentages, means and crosstabulations. It is through modeling interrelationships between study attributes that action items can be most easily drawn from the data. This can lead to meaningful, and often inexpensive, process change improvements.

## Step 4 Customer satisfaction model

Modeling techniques also allow firms to identify customer segments. Through the identification and characterization of customer segments, targeted marketing campaigns can be developed and implemented. For instance, a firm can isolate customer segments based on similarities in attitudes, demographics, products purchased, and attributes that are most important to that segment. These results can be used to develop

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marketing campaigns with products and promotional offers that coincide with that segment's preferences. The promotional literature can include wording that reinforces those attributes. Customers are more likely to buy from companies that make offers tailored to them, and talk to them using language that they can relate to.

The analysis of customer satisfaction data, including modeling, will derive those items which, when acted upon, have the greatest potential to drive satisfaction, leading to word-of-mouth referrals and increased loyalty. For example, imagine you are calling a company to have a billing issue resolved. You were

**5 Step**  
**Initiate meaningful changes**

supposed to receive a credit to your account, which has never appeared on your statement. After navigating

an automated call routing system, you finally talk to a person. That person is unable to help you and puts you on hold. Two transfers later, your problem is solved.

Several action steps with different cost implications might be potentially recommended, such as empowering your representatives to solve all billing problems, having a group of clerks set aside to handle billing issues, or adding a code to your call routing system to send a customer directly to the person in charge of issuing credits.

An analysis of satisfaction drivers might indicate that the last choice, adding a code to the routing system, is optimal. This is because "saves me time" was the most important component of the desired solution. Coincidentally, this is also the solution which is easiest to implement for the company, and least expensive as well.

Well-designed and analyzed research can help a firm make

changes which are the most meaningful. Repeating the measurement process at a point of time after changes have had a chance to take effect will indicate their impact on stated loyalty, as measured by customers' stated future purchase intent and likelihood to recommend.

All companies compete on price, up to a point. The more differentiated your product or service is, the smaller the role price plays in many customers' decision to purchase.


**6 Step**  
**Increase value**

While price can never be ignored, the company that demonstrates it is adding value to the relationship has a competitive edge.

If you are measuring satisfaction and acting on it, talk about it. Say "We listened to you, and here's what we did as a result." Solicit feedback. Don't assume your customers intrin-

sically know what you are doing. This simple action helps create a partnership between the customers and you, which increases perceived value.

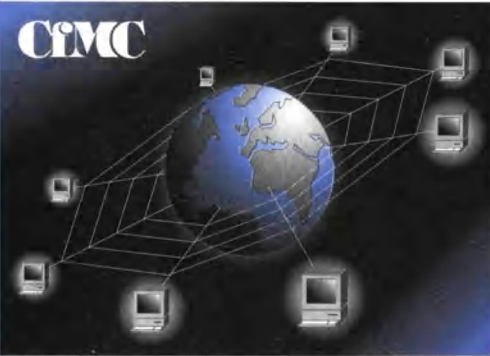
Increasing value does not necessarily mean you have increased your costs. If you are allocating your resources more effectively, your costs may actually decrease. In the example above, less CSR time is needed to solve the specific issue.

Customers have a finite amount of time and money to spend. Companies that demonstrate they value both resources come out winners. Customers want a reason to be loyal. Companies that plan to achieve loyalty, and put a Stepwise Process™ in place to meet their goals will ultimately earn it. 

**7 Step**  
**Achieve loyalty**

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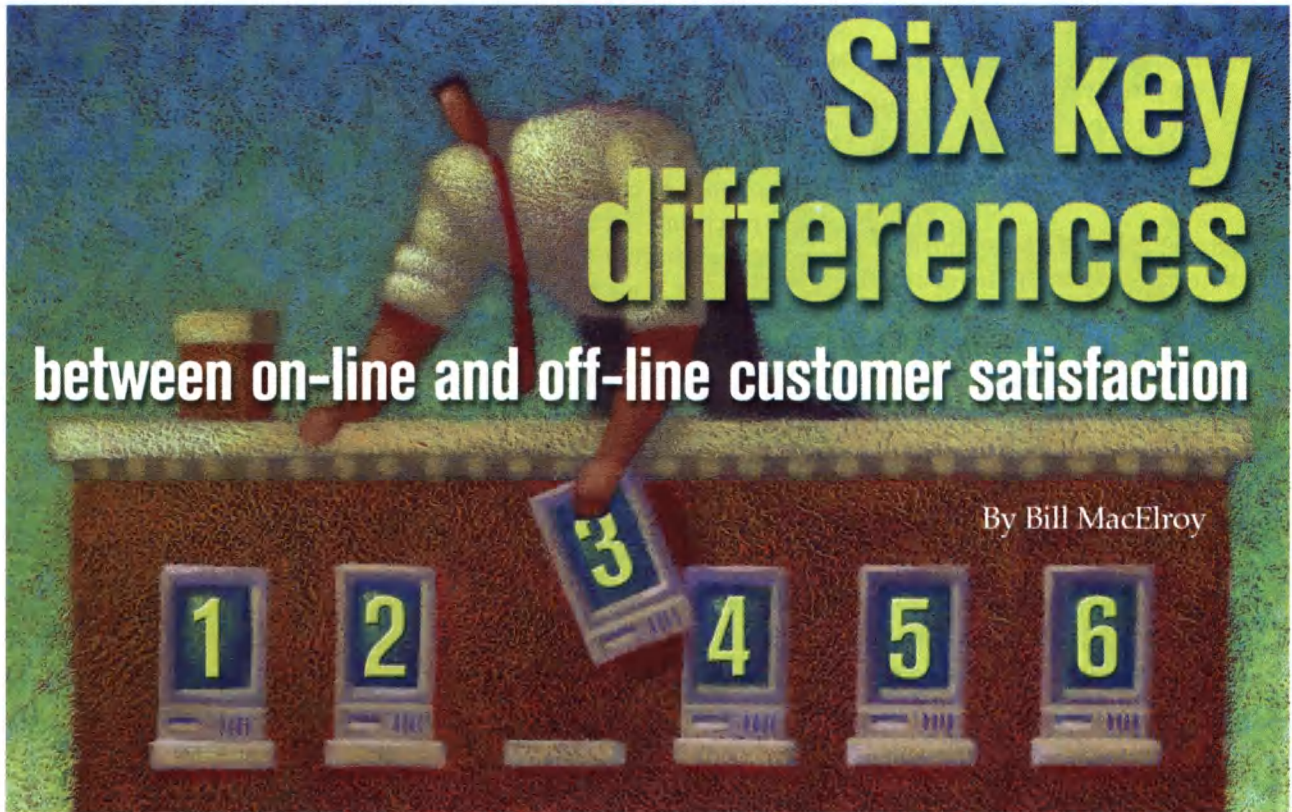


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*Editor's note: Bill MacElroy is president of Socratic Technologies, Inc., a San Francisco-based research firm. He can be reached at 415-648-2802 or at bill.macelroy@sotech.com.*

Over time, people in the business of providing on-line access and services have found that some profound differences exist between the attributes which drive on-line and off-line customer satisfaction. These differences appear to be impelled by six divergent characteristics between the two modes of doing business, each of which we will examine here in some detail.

1. Hyper-evolution of on-line customer sophistication.
2. On-line offers immediacy of comparative offers/increased price sensitivity.
3. Instant access to referent authority/word-of-mouth lowers on-line cost of information.
4. On-line appears to have lower barriers to brand switching.
5. On-line one-to-one marketing

model yields increased choice options.

6. Off-line satisfaction is transaction based; on-line satisfaction is process-based.

**Rapid evolution of on-line customer sophistication**

Traditional product and brand development has benefited from the fact that off-line consumer tastes and

world." In the on-line environment, however, consumers change rapidly as a by-product of experience. Levels of "satisfaction" with an on-line process can change in a matter of months.

We refer to this phenomenon as hyper-evolution of sophistication. Hyper-evolution has a dramatic effect on what will



Descriptor	Average Time Threshold	On-line Characterization
New User	0 to 6 months	Explorers, seeking entertainment, somewhat confused by diverse resources, seeking order out of chaos. Most likely to start with an on-line service provider (e.g., AOL; and historically CompuServe, Prodigy, Genie, etc.)
Learner	6 months to 1 year	Explorers and researchers. Beginning to use the Web more as an information source. Little or no e-commerce – some residual fear of transaction-based activities.
Tool Users	1 year to 18 months	Transition to "tool users" from exploration. Adoption of multiple ISPs (e.g., MCI WorldCom, MindSpring, Netcom, EarthLink, etc.) and OSPs (e.g., AOL, Prodigy). Organization, efficiency and speed of informational content become paramount. Fun becomes a tertiary driver of satisfaction. E-commerce trial is common, but not frequent.
Wired Users	Over 18 months	Internet and cyber-communication becomes a way of life. Extensive emotional investment in virtual systems. Frequent e-commerce and informational transactions.

demands can take years to change. Brand positioning, basic messaging, and effective promotional strategies can yield incremental satisfaction ratings increases for decades in the "real

satisfy on-line users. The accompanying model shows our interpretation of the findings from 15 studies conducted with on-line users of Internet service providers and e-business sites



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from 1995 through 1999.

### Immediacy of comparative offers/increased price sensitivity

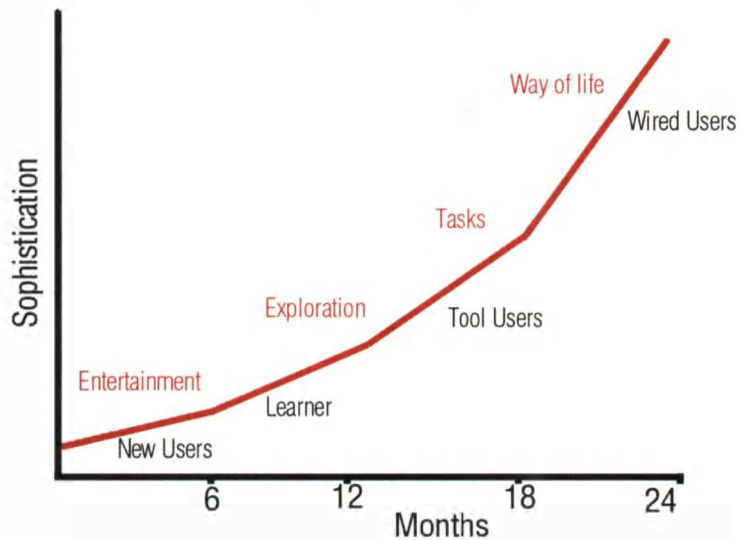
Unlike traditional retail (brick & mortar) shopping, on-line commerce provides hundreds of options instantly (as shown in the price comparison in Fig 2). In-stock positions rather than location or retail brand become critical for the on-line shopper's consideration. Prices among in-stock suppliers become a second filter for the decision to purchase. Price must also be weighed in consideration of "total cost" including extra costs of shipping, handling, etc. All of these factors give on-line customers far greater power to decide between vendors. Satisfaction, therefore, becomes highly dependent on availability and delivery performance of those vendors with the best price.

### Instant access to referent authority/word of mouth

For off-line customers, information about products/manufacturers carries a premium in the real world. Time and effort must be expended to form expectations about goods and services providers. Store personnel are usually not capable of expertise in specific



Fig. 1: Hyper-evolution of On-line Customer Sophistication Model — Characteristic Activities of On-line Users Over Time



models/lines. Access to word-of-mouth referrals is limited to friends/colleagues. In this environment, brand perceptions play a key "time saving" shortcut to decision-making. Once a satisfactory brand is discovered, there are time and effort barriers to reconsidering one's position. This has the effect of making satisfaction ratings "sticky" for a given brand.

For on-line customers, however, information about products/manufacturers is available in great detail almost instantaneously. Expert comparisons and evaluations are often available

through neutral third party analysis. On-line tools can make specific product configuration recommendations based on the user's specific intended use. Chat boards debate the value of features and refute irrelevant benefit claims. This means that a person's cost of reconsidering his or her level of satisfaction and commitment to a brand is lower.

### Lower barriers to brand switching

As the cost of obtaining product information decreases, so do the barriers to brand switching. In a world of information deficit, trust in a brand means a savings of time and effort, but in a world of rich information, brand can become a secondary decision criteria. Some of the biggest real-world brands have been known to produce some of the worst on-line experiences. On-line brands can move faster to create a satisfactory substitute for established brands. It appears that it is easier to establish general credibility on-line (witness the speed at which E\*Trade captured a large share of the securities trading market or Amazon.com's success in rapidly acquiring shares of the book and music distribution channel).



### One-to-one marketing increases choice options

Most marketing prognostications say that the system of mass marketed goods is being rapidly supplanted by

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on-line product configuration systems. Individual specifications add tremendous variety to choice. In the on-line environment, real-time price/feature tradeoffs yield optimal customized products configured to the individual user's needs. The volume of choice in features and services yields a much larger range of opportunities for customer satisfaction/dissatisfaction. The hierarchy and pattern of how the individual makes choices becomes as important as stand-alone features in satisfaction measurement.


### Driven by perceptions

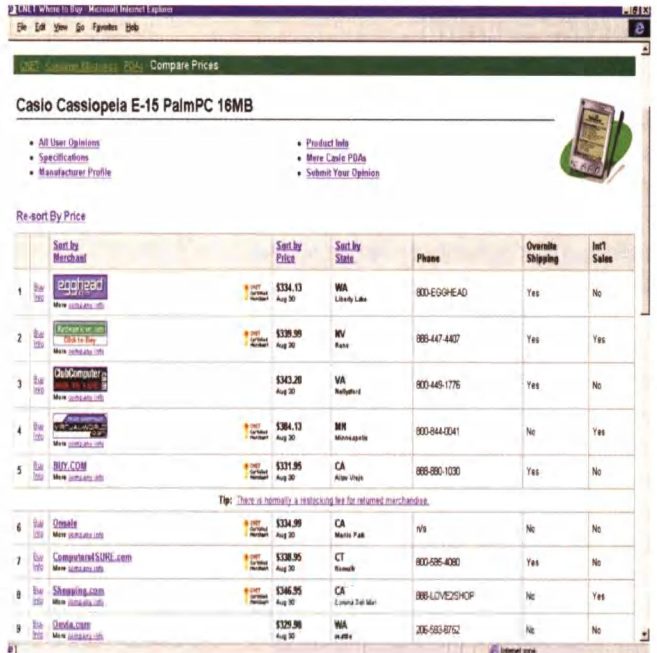
Off-line customer satisfaction appears to be driven more heavily by brand and transaction perceptions. In the real world, fewer elements of information, consideration and choice are scrutinized due to the personal cost associated with gathering information. Satisfaction appears



to occur at higher, more generalized levels of perception, most commonly related to brand.

On-line satisfaction on the other hand, appears to be more complex and is process-oriented. What is successful for creating on-line satisfaction differs over short periods of time for the same individual. Tremendous volumes of information and increased choice creates far more points for customer evaluation and resultant levels of satisfaction. Satisfaction can, therefore, occur at many more levels and stages of process. A hierarchy of satisfaction emerges in which some elements of

the transaction must be satisfied before others are even considered. Achieving excellence in many elements of the process may be necessary, but they are not sufficient by themselves to create overall satisfaction with the on-line experience. 



C/Net Vendor Output for Casio Cassiopeia E-15 PalmPC 16MB

Rank	Vendor	Price	State	Phone	Overnite Shipping	Int'l Sales
1	egghead	\$334.13	WA	800-EGGHEAD	Yes	No
2	Future.com	\$338.95	NV	888-447-4407	Yes	Yes
3	ChicoComputer.com	\$343.20	VA	800-445-1776	Yes	No
4	ComputerDirect.com	\$384.13	MN	800-844-0041	No	Yes
5	BUY.COM	\$391.95	CA	888-880-1030	Yes	No
Tip: There is normally a restocking fee for returned merchandise.						
6	OmniTel	\$394.99	CA	916	No	No
7	ComputerSING.com	\$398.95	CT	800-586-4080	Yes	No
8	Shawling.com	\$398.95	CA	888-40VESHOP	No	Yes
9	Compa.com	\$399.96	WA	206-553-8752	No	No

Fig. 2: C/Net Vendor Output (source: www.CNET.com)

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## Survey Monitor

continued from p. 6

students have taken a course on personal finance in school (almost 80 percent have not). That isn't for lack of opportunity: 62 percent of students say their current school or a prior school they attended has offered a financial education class. At the same time, students who took a personal finance course said they felt more knowledgeable about money management, but the survey found that they were no more likely than nonattendees to think it is important to save money on a regular basis, or to actually save money that they receive from jobs and/or allowances.

The survey also shows that today's students have significant work experience and are making money. Forty-one percent of students worked full-time last summer (35 or more hours per week), according to the survey. Twenty-four percent of students typically earned \$5,000 or more annually, and only 36 percent earned less than

\$2,500 in a year. The youth survey, underwritten by the TIAA-CREF Institute, also shows that 39 percent of students receive an allowance or other regular money from their parents (59 percent of the allowance is tied to either grades or chores).

What are students doing with their money? According to the Department of Education, students used credit cards to borrow \$38 million last year, compared to \$27 million in 1997. The Youth & Money Survey found that 28 percent of students with credit cards are already rolling over credit card debt each month. Other top items and expenses paid by students include: entertainment (82 percent); clothes (58 percent); car or related expenses (50 percent); vacation or trips with friends (45 percent); and school needs (31 percent). Students are also investing their money in mutual funds (18 percent); stocks (18 percent), and CDs (16 percent). The 1999 Youth & Money Survey surveyed 1,000 students ages 16-22 regarding their attitudes and behavior towards personal finance. For

more information visit the organization's Web site at [www.asec.org](http://www.asec.org).

## 1st & Ten scores

According to a poll released by Harris Interactive (HI), a Rochester, N.Y., research firm, an overwhelming majority of football viewers like the 1st & Ten technology that electronically superimposes a first-down line on the playing field during televised broadcasts. Nominated for an Emmy Award in the Innovative Technical Achievement category, 1st & Ten, developed by SporTVision, was premiered by ESPN during the 1998-99 NFL season for its Sunday night games.

The on-line poll found: 83 percent said they like the 1st & Ten system; 92 percent said they would like to see the superimposed first-down lines used on all football telecasts; 64 percent of "casual" viewers said that 1st & Ten increased their understanding of the game, with almost half of them saying the 1st & Ten line would increase their likelihood of watching football games; 92 percent believe it will increase the understanding for kids; four out of five viewers report that the 1st & Ten yellow line increases their level of enjoyment. Nearly three-quarters (71 percent) believe that the first-down line would add to the level of enjoyment when watching games on "jumbo" screens in stadiums.

The technology underlying 1st & Ten is sophisticated. The location of the first-down line is entered into the system computer by the broadcaster's statistics staff. The system then gathers data on the camera's pan, tilt, zoom and focus functions. With this information, the system knows where in each frame of video the line should appear. The computer then analyzes the line 30 times per second and determines whether the images in the frame of video are the field, a player, the ball, referees, or something else.

HI was commissioned by SporTVision to conduct the research, which used the same Internet methodology that was used in Harris' 1998 Election Poll. The survey for SporTVision involved 1,285 qualified



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respondents — which were defined as individuals who observed the 1st & Ten marker on ESPN last year. Three out of five (61 percent) of the respondents reported that they were avid football fans. HI weighted the results to reflect the universe of NFL television viewers. The testing was done at the 95 percent confidence level. For more information visit the company's Web site at [www.harrisinteractive.com](http://www.harrisinteractive.com).

## Top 10 'junior wired' cities

Based on a survey conducted by Digital Marketing Services, Inc., a Lewisville, Texas, on-line research firm and a wholly owned subsidiary of America Online, Inc. (AOL), AOL has uncovered the 10 most "junior wired" cities in America based on the amount of time children ages 2 to 17 spend on-line (according to more than 16,000 randomly selected parents visiting AOL's Opinion Place from May 24-June 3).

The Top Ten "Junior Wired" cities are:

1. New York
2. Philadelphia
3. Tampa/St. Petersburg/Sarasota
4. Los Angeles
5. Cleveland
6. Boston
7. Detroit
8. Washington, D.C.
9. Chicago
10. Seattle

In these cities, the approximate average time spent on-line weekly increases with age and is as follows: ages 2-5: three hours; ages 6-11: four hours; ages 12-14: six hours; ages 15-17: seven hours.

According to Jupiter Communications, more than five million children under the age of 12 are on-line, with that number expected to

grow to 20 million by the year 2002.

By any measure, computers are an increasingly integral part of young people's lives. In a recent AOL Families Channel poll, AOL parents said their kids are more likely to "fight" over the computer than the telephone. Additionally, 25 percent of 10,000 parents polled said their kids are using the computer by age 2 and 90 percent said their children are using the computer by age six. For more information call Caroline Teasdale at 703-265-1292.

## Tortillas on a roll

The Tortilla Industry Association (TIA) has announced the findings of a market research study which confirm the tortilla's standing a fast-growing segment of the baking industry worldwide, with global sales estimated at more than \$6 billion in 1998. Specifically, the survey revealed that the North American and European tortilla markets continued to grow in 1998, with sales surpassing \$3.5 bil-

lion, and projects sales to reach more than \$5.5 billion in the next five years. Respondents to the survey indicated that, in 1998, the growth rate of corn tortilla sales surpassed that of wheat flour tortillas. However, the flour tortilla still reigns as the principal product in the industry. The study, executed by Penn and Associates, Cleveland, was conducted via telephone interviews with 101 North American and European tortilla manufacturers in April and May 1999.

The growing popularity of tortillas is attributed to the acceptance of tortillas by non-Hispanic cultures as a staple food, much like bread. The emergence of wraps (recipes using flour tortillas with a wide variety of non-Hispanic fillings) helps to bridge the transition of tortillas from ethnic item to mainstream dish. In addition, the study also highlights increased consumer awareness due to more advertising, the development of flavored tortillas, and expanded shelf space as trends responsible for market growth. For more information visit the



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## Study identifies trends in sports participation

According to a survey of 16,190 Americans conducted by American Sports Data, Inc. (ASD), Hartsdale, N.Y., paintball, artificial wall climbing and the use of elliptical motion trainers were the fastest-growing activities in the U.S. during 1998.

Though not measured since 1988, when it claimed only 658,000 participants, paintball emerged as the top U.S. growth activity, with 5.9 million people having engaged in the activity at least once in 1998 — an increase of 800 percent over the decade.

In the product market, this growth has been underscored by the industry leader, Brass Eagle, Inc., an Ark.-based firm which has doubled its sales over the past year. Further confirmation of the activity's growth, according to ASD President Harvey Lauer, lies in the number of recent converts to the activity. "Forty-nine percent of the participant base — nearly three million paintball players — are first-year entrants. This strong recruitment rate is suggestive of high growth potential," he says.

Another fast-growing activity monitored by the study is artificial wall climbing — a hybrid fitness/outdoors phenomenon which has spurred the rapid growth of indoor climbing walls at health clubs and small studios dedicated to the activity. In 1998, 4.7 million individuals over the age of six performed the activity at least once, a 42 percent increase over the results of a pilot study conducted by ASD for 1997. Moreover, 62 percent of all 1998 participants were newcomers, further underlining growth prospects for wall climbing. By contrast, the study uncovered only two million "outdoors" mountain/rock climbers, who used technical climb-

ing gear.

Elliptical motion trainers — by far the hottest fitness equipment trend — have surged to 3.9 million users in 1998, an increase of 63 percent over 1997. This recently-introduced cardiovascular equipment involves an elliptical-shaped pedaling motion which has been described as a cross between a Nordic ski machine and stair-climber. Here again, a sharp increase in participation has been validated by a very high percentage of first-timers (57 percent) in the 1998

user population. But unlike various equipment fads which have come and gone, the study found evidence of staying power for this fledgling activity. "Elliptical trainers have passed the litmus test of health club acceptance," Lauer says.

"The majority of these machines (56 percent) are used in health clubs and Ys, compared with only 13 percent for cross-country ski machines and 15 percent for aerobic riders — the latter two being infomercial-driven trends which were never accepted at clubs, and in the end, could not be sustained." Indeed, from 1997-1998, Nordic skiers and aerobic riders were among the worst performers, suffering respective declines of 23 percent and 32 percent for the year. Another infomercial-driven product, abdominal machines/devices, sustained a participation loss of 20 percent.

Overall, the exercise boom seemed to be taking a breather. With the exception of home gym exercise, which earned a gain of 11 percent, the remainder of fitness activities could muster only a lackluster performance at best. Weight training — driven by women and seniors to a degree that seems counterintuitive — gained only 4 percent in 1998, rising to a participant population of 41.3 million. Treadmills, the dominant cardio equipment and premier moneymaker, finally plateaued with a slight increase of 3 percent from 1997-1998, but up 743 percent from 1987.



A first-time-ever measurement of spinning revealed 6.8 million total participants, of which 1.6 million were dedicated exercisers who performed the activity on at least 100 occasions during 1998. However, an influx of only 28 percent first-year participants in 1998 suggests that the activity may be cooling. An equal number of recumbent cyclists (6.8 million) were projected by the study, and overall, stationary cycling reflected a slight loss for the year (-4 percent) as it declined to 30.8 million.

Several star performers of yesterday were no longer ascendant. In-line skating, which had topped the growth charts for years, was flat at (+1 percent). Golf, perhaps aided by the Tiger Woods blip of 1997 when it had jumped by 11 percent, retreated to a 3 percent loss in 1998. After reaching its zenith in 1996, mountain biking, the beneficiary of triple-digit growth in the 1990s, was stable (+2 percent). While snowboarding could achieve only a 10 percent gain in 1998, a substantial infusion of new blood (44 percent of all boarders were new converts) augurs well for the activity.

For the first time in recent memory, fishing has risen by a significant 10 percent to 55.5 million participants in 1998, but this favorite American pastime is still below the level of 58.4 million first measured in 1987. Even fly fishing — which despite the fervor of its aficionados and excessive media hype (including a major Hollywood film) had nonetheless plummeted by 42 percent from 1987-1997 — enjoyed a leap of 11 percent in the current year. While this appears to be good news for the fishing industry, Lauer cautions that “It’s doubtful that all the deep-seated problems of fishing — such as depleted stocks, changing values toward ‘blood’ sports, increasing competition from New Age activities and so on — can be reversed in a single year. Chances are that fishing, along with other outdoor pursuits, was simply the beneficiary of good weather in 1998.”

Mild weather may have also aided

RV camping (+13 percent), tent camping (+4 percent), day hiking (+8 percent) and other outdoors activities. While no comparative data exist for the first-time-ever measurement of kayaking, 43 percent of its participant base of 3.5 million were newcomers, a very positive indicator.

Overall, the U.S. sports participation picture was not bright. Most remaining sports and activities were uniformly flat or depressed in 1998: baseball (-7 percent), basketball (-6 percent), football (-4 percent), soccer (-3 percent), softball (-5 percent), volleyball (-8 percent), tennis (-3 percent) and racquetball (-5 percent).

This apparent industry malaise, according to Lauer, “is a complex result of population aging, competition from other leisure activities, not to mention the abdication of responsibility by our schools. Encouragement of physical activity should begin early on, but this doesn’t seem to be an educational priority anymore. And to make matters

worse, our prime pool of sports participants isn’t growing. For example, despite the steady growth of the U.S. population, the 20-29 age group has actually shrunk by 10 percent from 1990-1997. And last but not least, there’s technology — the natural enemy of physical activity. Only today it’s not the elevator or the automobile — it’s the Internet. Tomorrow, it could be a magic pill that prevents weight gain.”

The Superstudy of Sports Participation was conducted in January 1999 and based on a nationally representative sample of 16,190 people over the age of six, who were among 25,000 targeted in a sample drawn from the consumer mail panel of NFO Research, Inc. Over 100 sports and activities were measured along with over 20 demographic, attitudinal and behavioral dimensions. Data were also collected on health club membership and other subjects pertinent to physical fitness. For more information call 914-328-8877.



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## Product & Service Update

continued from p. 10

employed in technology companies are also invited to join. Members of The Technology Advisory Board are paid cash for their opinions and advice, ranging from a minimum of \$10 to \$200 or more per survey, depending on the length of the questionnaire or discussion. The opinions, information and advice of Board members are confidential and anonymous. Members' answers are grouped together and reported as statistical summaries. The purpose of the Technology Advisory Board is purely for marketing, business, and economic research. Members' names and addresses will not be revealed to anyone outside of Decision Analyst, or used for any purpose other than research. Membership is free, and participants have the opportunity to express opinions, give advice, and argue points of view to help governments and major corporations make better decisions about technological issues and new high-technology products and services. For information on

becoming a member, please go to [www.technologyboard.com](http://www.technologyboard.com) or call Jerry Thomas at 817-640-6166.

## Web-based research service aimed at Hispanic market

Target Market Research Group, Inc., Miami, has introduced encuesta.com (the equivalent of "survey.com" in Spanish), a new service division aimed at providing custom qualitative and quantitative marketing research among the nation's Hispanic/Latino population.

Encuesta.com uses research techniques such as e-mail/on-line based surveys and on-line discussion groups, as well as the live transmission of traditional focus groups via the company's dedicated Web-site at [www.encuesta.com](http://www.encuesta.com). Encuesta.com also offers man-on-the-street type and in-home ethnographic surveys.

A study conducted by the U.S. Department of Commerce (National Telecommunications and Information

Administration and U.S. Census Bureau – "Falling Through The Net: Defining the Digital Divide" July, 1999) indicates that in December 1998, 26 percent of Hispanic households had a personal computer in the home (compared to 47 percent among white non-Hispanics), and 13 percent had access to the Internet (compared to 30 percent among white non-Hispanics). Target Market Research Group, Inc.'s own national survey incidence levels for August 1999 (n=820 telephone interviews, margin or error of  $\pm 2.8$  percent at a 90 percent confidence level) put PC penetration levels among Hispanic households at 36 percent and access to the Internet at home at 21 percent.

While Hispanics currently under-utilize the Internet compared to the general population, Martin Cerdá, Target Market Research founder and president, says that "There is evidence that minority groups, including Hispanics, are reaching for alternative sources of information and entertainment that cater to their needs and preferences in the immediate and relevant manner, which the Internet easily delivers. The continued growth of in-language portals such as QuePasa.com, and Latino interest Web sites such as those with Latin music related content and Spanish-language radio broadcasts will only fuel this growth." For more information contact Martin Cerdá at 305-661-1492 ext. 106 or at [martin\\_cerda@tmrgroup.com](mailto:martin_cerda@tmrgroup.com).

## Data collection for digital imaging market

Atlanta-based Imaging Resource, an Internet-based consumer resource for digital cameras, scanners, and software, has announced a new data collection service for market researchers and manufacturers in the digital imaging marketplace. Connected with the new service, the Imaging Resource also announced alliances with two market research firms specializing in digital imaging: Future Image Inc., San Mateo, Calif., and Imerge Consulting, of Belmont, Calif. The Imaging Resource provides consumers with information about digital imaging products, and is designed to facilitate purchasing deci-

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sions, and lead to positive post-purchase experiences. The Imaging Resource Market Data Service taps the traffic flow of the Imaging Resource Web site, representing nearly one million page views and 200,000 reader visits per month. The Imaging Resource Market Data Service presents reader survey forms to site visitors, and offers associated sweepstakes prizes to encourage survey participation. For more information call David Etchells at 770-772-6658 or visit the company's Web site at [www.imaging-resource.com](http://www.imaging-resource.com).

## Four new STATISTICA modules

StatSoft, Inc., Tulsa, Okla., has added four tools for analyzing complex and "messy" linear and nonlinear designs to its STATISTICA data analysis and graphing software. STATISTICA '99 features four new modules: Visual General Linear Models (VGLM), Visual Generalized Linear Models (VGLZ), Visual Partial Least Squares (VPLS), Visual General Stepwise Regression (VGSR). Each new module offers three alternative interfaces for specifying designs.

The modules offer the following functionality:

- Visual General Linear Models (VGLM) is an implementation of the general linear model for analyzing responses on one or more continuous dependent variables as a function of one or more categorical or continuous independent variables. VGLM offers the most complete selection of ANOVA/MANOVA types of methods available.

- Visual Generalized Linear Models (VGLZ) allows the user to search for linear and nonlinear relationships between a response variable and categorical or continuous predictor variables (including multinomial logit and probit, signal detection models, and many others).

- Visual General Stepwise Regression (VGSR) incorporates a comprehensive set of stepwise regression and best-subset model building techniques supporting both continuous and categorical variables.

- Visual Partial Least Squares (VPLS)

offers a similar selection of user interfaces to that of VGLM, VGSR, and VGLZ, and includes a selection of algorithms for analyzing univariate and multivariate partial least squares problems. For more information visit the company's Web site at [www.statsoft.com](http://www.statsoft.com).

## Firms partner to provide Web research

MarketTools, Inc., Sausalito, Calif., has partnered with International Data Corporation, Intercom, Merrill Research, ORC International, Prognostics, Roper Starch Worldwide, and Total Research, to offer Internet research services. One of the first applications of MarketTools for real-time point-of-sale feedback in the retail market is being implemented by @pos.com, a MarketTools technology partner. Through MarketTools, @pos.com lets customers conduct Web-enabled surveys directly at the point-of-sale about consumer opinions and shopping satisfaction.

Services include:

- eSurveys that support the full life cycle of a Web-based survey, from design stage to implementation. Services include project planning and design, sample acquisition and management, auto-translation into multiple languages, survey hosting on a secure Web server, respondent authentication, real-time reporting of results, data cleansing, tabulation and export, and more.

- ePanels that automate the creation, deployment, and ongoing management of on-line panels (syndicated and proprietary) from recruitment to incentive program management. EPanels are fully integrated with eSurveys.

- eSample to meet the challenges of Web-based sample acquisition and management and offer strategies for selecting the highest quality data sources, managing sample bias, and incorporating normalization and weighting schemes.

- nGauge, an integrated application suite to create and deploy Web-based surveys, view real-time results, build and maintain on-line market research



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## Instant Intelligence debuts

The Brand Futures Group (BFG) of New York-based Young & Rubicam Inc. (Y&R) has devised a consumer research system that can deliver global findings within 24 hours. The new service, Instant Intelligence, calls upon the agency's network of Trendscouts and can produce results in hours. The system works by utilizing volunteers from within Y&R's network of 14,000-plus employees worldwide. These individuals range from administrative assistants in South Africa to media planners in New York City, to strategic planners in London and cost accountants in Malaysia, Taiwan, and Zimbabwe. Using a number of prearranged databases within the workforce, covering a wide spectrum of social classifications

and other demographic considerations, Brand Futures Group e-mails questionnaires to employees for their immediate response. As soon as a sufficient number of replies has been received (n = 200), BFG's in-house analysts collate the responses and prepare a report of the findings. Nonproprietary findings culled from BFG's Instant Intelligence studies are sold at the group's Web site ([www.brandfutures.com](http://www.brandfutures.com)) and on the Profound service of Dialog. For more information contact Ira Matathia at 212-210-3004 or at [ira\\_mathia@yr.com](mailto:ira_mathia@yr.com).

## Tool measures pharmaceutical marketing programs

A new tool to gauge the effectiveness of retail pharmaceutical marketing programs, the 1999 Retail Pharmacy Capabilities Report (RPCR), is now available to pharmaceutical manufacturers, retail pharmacy chains and drug wholesalers. This first in a series of reports compiled annually rates how

well retail pharmacy programs have done in driving sales and market share. The RPCR was created by Creative Healthcare Solutions, a Saratoga Springs, N.Y., pharmaceutical marketing consulting firm, and Delta Marketing Dynamics, a Jamesville, N.Y., pharmaceutical market research firm. The RPCR is based on data collected from a survey fielded to executives and key decision-makers from pharmaceutical manufacturers, retail pharmacy chains and drug wholesalers. The report ranks each organization's capabilities and includes verbatim information from survey respondents. For more information call Rob Jacobson at 480-905-8373.

## SYSTAT 9 from SPSS Science

SPSS Science, Chicago, has released SYSTAT 9. Offering expanded data management options, automated graph creation and new statistics procedures, this release increases the efficiency of statistical analysis and graph creation. New features in this version include:

- SAS, ODBC, HTML file options — expands data management capabilities. Users can quickly convert data files between SAS and SYSTAT formats, access ODBC database files or save their output to HTML.

- Graph Gallery — creates graphs automatically. Users choose an item from an exhaustive display of graphs, then quickly substitute their data. Users can also add their own graphs to the gallery for automated graph creation.

- Command Templates — provides even greater automation flexibility by allowing users to quickly substitute their data and variables into automation routines. Users can now create token variables in command files to allow swapping of data and variables when automating routine analysis.

- Missing Values Analysis — imputes missing values when data are missing from a data set. Users can save the new values or a matrix for use in further statistical analysis.

- Smooth Module — helps visualize patterns in noisy data using 126 non-parametric smoothers. It gives users the option to save estimated values at either


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## Guide to multicultural experts

New York PR and marketing firm Multicultural Marketing Resources is offering the 1999-2000 edition of its Source Book of Multicultural Experts, which lists over 200 companies and organizations specializing in multicultural marketing services. The book includes cross-reference listings by company type (ad agency, research firm, etc.) in industry area of expertise (cosmetics, entertainment, etc.). For more information call 212-242-3351 or visit [www.inforesources.com](http://www.inforesources.com).

## Research/calling card combo

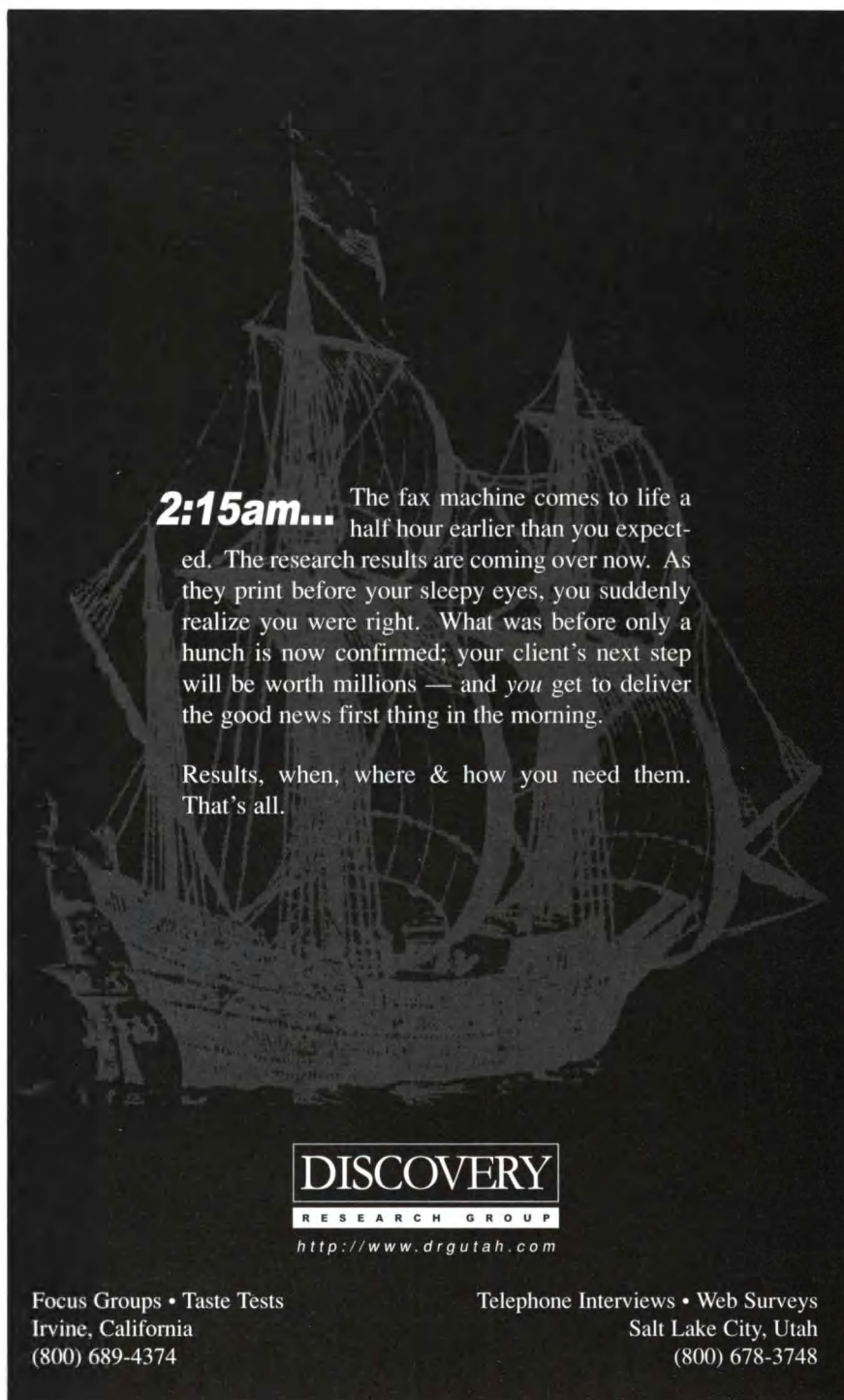
FCG, Inc., Bellevue, Wash., has developed the ATM prepaid TeleSurvey phonecard. FCG's service combines a traditional phonecard with its telephony technology to create a product that can include market research and information services. FCG's TeleSurvey is added to the bank's phonecard program, but as an optional choice for the consumer. A purchaser who chooses to answer the questions in the TeleSurvey is immediately rewarded with additional minutes on the calling card. This option allows a bank to conduct market research while offering a branded product at the same time. FCG offers other information services, which are added to a phonecard as needed. The card is used to directly access a bank's network or customer service center, providing information to the consumer regarding loan processing, merchant services or demand deposit accounts. For more information contact Moe Ghaffari at 425-957-4444 or at [Moe@fcginc.com](mailto:Moe@fcginc.com)

or visit the company's Web site at [www.fcginc.com](http://www.fcginc.com).

## Annual IT survey launched

Professional Services and Solutions 1999, the first of what will become an annual market research survey designed for information technology companies that provide professional services and solutions, has been launched through a joint partnership of the Information

Technology Services Marketing Association (ITSMA) and NFO Prognostics, an NFO Worldwide company. The study — known as a comparative survey because the process gathers data from multiple vendors, performs individual and competitive analyses, and then distributes all results back among participants — will quantify the customer experience for IT companies providing professional services. Previously, ITSMA research has found that references from colleagues and a prior rela-



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tionship are the most influential factors in the purchasing decision for professional services. The study will further explore why customers partner with professional services providers and will measure experiences that impact referenceability, loyalty, and future purchase intentions. For Professional Services and Solutions 1999, NFO Prognostics will survey thousands of business customers of participating companies to determine and quantify the key elements affecting their satisfaction with professional services solutions. By comparing every element of performance to an industry average, specific competitors, and other leading companies, participants can uncover areas of competitive weakness and strength. The survey offering grew out of demand from market leaders among high technology and professional services consultancies who have seen tremendous growth but increasing competition, and increasing demands from customers in their professional services businesses. For more information call Margaret Coles at 650-812-3900.

## Got questions? Ask Netroscope!

Netroscope, a Santa Clara, Calif., research firm, has introduced Ask Netroscope!, a new Internet research service that will provide electronic

response to on-line inquiries from Netroscope clients asking clear, single part questions concerning market data, analysis, tutorial explanation, competitive information, pricing and vendor strategies. Clients will have the opportunity to submit their questions on-line and receive answers via e-mail in less than 24 hours for a fixed price of \$9.95 per question for subscribers and \$14.95 per question for non-subscribers. Annual subscription rates are \$29.95 for individual users and \$99.95 for corporate groups. The areas of service coverage include e-commerce, e-business, Internet computing, enterprise solutions, software technologies, products, and languages, electronic bill presentment and payment, Internet banking, security, and networking. Netroscope will provide information from numerous sources, including exclusive surveys, research and analysis conducted by Netroscope, other customer and channel surveys, company information sources, one-on-one interviews, news information sources, industry reports and trade journals, marketing and advertising information, legal news sources, financial information sources, the Internet, and other sources. For more information visit the company's Web site at [www.netroscope.com/ask/askindex.html](http://www.netroscope.com/ask/askindex.html).

## WinCati from Sawtooth Technologies

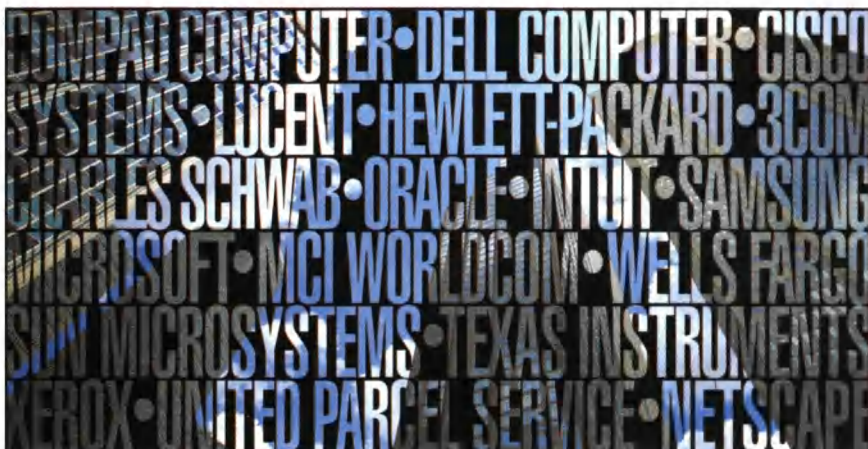
Sawtooth Technologies, Evanston, Ill., has released WinCati, the new name for Version 4.1 of its CATI software (formerly Ci3 CATI for Windows). Designed around a Sybase SQL Anywhere database engine and a Windows interface, WinCati is designed to meet the needs of any size facility. The new version works with standard Windows applications such as Microsoft Word, Excel, and Access.

WinCati has several new capabilities and options, including: support for wide area networks (WANs); SQL/ODBC database engine; refusal tracking; improved multi-language capability; a never-call list; the ability to export reports to Excel; and new questionnaire authoring capabilities.

Along with WinCati's change to a client-server application and the new enhancements, three new options are also available: voice capture and sound playing; proactive dialing; and predictive dialing. For more information call Brett Jarvis at 847-866-0870 or visit the company's Web site at [www.sawtooth.com](http://www.sawtooth.com).

## Seagate/USADATA partnership

Seagate Software, a business intelligence software firm, has partnered with USADATA.com, a marketing information and Internet technology company, as a data and content provider. Under the arrangement, USADATA.com will offer Seagate Software customers access to its library of worldwide syndicated business and consumer information through a new joint Web site located at <http://seagatesoftware.usadata.com>. The two companies' products and services are complementary. Seagate Software develops applications that allow customers to access and analyze multidimensional data sets using Seagate Info and Seagate Crystal Reports software. USADATA.com offers data — such as U.S. Government Census data projected to the current year, business directories and demographics, and regional growth potential forecasts — that can be



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## Apparel loyalty award from NPD

The NPD Group, Port Washington, N.Y., has issued the first annual NPD Consumer Loyalty Award for apparel retailers. The honor recognizes retailers who are leading the way in consumer loyalty by capturing the greatest share of their customers' apparel purchasing requirements in one of five categories. The winners are: JC Penney (Men's Apparel), The May Co. (Women's Apparel), Federated (Department Stores), Wal Mart (Mass Merchandisers) and Lane Bryant (Specialty Stores).

Winners of the NPD Consumer Loyalty Award captured between 15 percent and 26 percent of total dollars their customers spent on apparel, the highest shares in the industry for their respective categories. Results are based on NPD's analysis of more than 500,000 transactions at over 100 of the nation's leading retailers during 1998.

Overall, NPD found more loyalty among department store and specialty store apparel shoppers and less loyalty among discount store apparel shoppers. Average loyalty shares among channels ranged from 10 percent in the discount channel to 18 percent in the department store channel.

To establish a loyalty ranking system and to name winners for this award, NPD conducted a two-phase analysis using data from its American Shoppers Panel, a demographically and geographically balanced panel of 16,000 households who report all apparel purchased and where it is purchased throughout the year. In phase one of the analysis, the firm identified the customer base for each retailer tracked and tallied total purchases made. After totaling all purchases, NPD then determine what percentage of participating households' needs/requirements (measured in dollars) were purchased at each individual store (phase two). This "share of requirements" figure is the measure of

loyalty. For more information visit the company's Web site at [www.npd.com](http://www.npd.com).

## New OMR software tool

Principia Products, Inc., a Paoli, Pa., software firm, has introduced Remark Classic OMR, a software product that enables users of OMR readers to transfer data from completed forms into a usable electronic format for analysis. Remark Classic OMR collects the raw data from these forms so a user can

analyze the results with a statistics, spreadsheet or database software package on a personal computer. Remark Classic OMR exports data to industry-standard formats rather than a proprietary file format and is compatible with a variety of scanners and pre-printed forms. It also includes features such as survey tabulation, test grading and flexible output. For more information call 800-858-0860 or visit the company's Web site at [www.PrincipiaProducts.com](http://www.PrincipiaProducts.com).



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## Names of Note

continued from p. 8

*Spiller Research Group*, St. Petersburg, Fla., has named **David Moak** vice president of research and development. Moak will head the firm's new advanced research division.

**Anne Bernstein** has been named vice president in the consumer trends division of *Roper Starch Worldwide*, New York.

*Clearwater Research* has announced several new hires and promotions at its Boise, Idaho home office. The new hires: **Kerri Holloway** as data collection project technical assistant, **Gretchen Hawes** as usability lab specialist, **Laurie Kuntz** as usability lab recruiter, **Brandyn Romo** as research analyst, and **Adam Cummings** as summer intern. The promotions: **Pamela Hansen** to data collection project technical assistant, **Julie Rieman** to day shift supervisor, **Deanna Fisher** to day shift supervisor, **Clyde Dooley** to senior supervisor of the Boise data collection department, **Ward Ballard** to research analyst, and **Charles Dickinson** to senior

research analyst. Separately, *Clearwater's* **Mike Exinger** has been named president elect of the Southwest Chapter of the Marketing Research Association for 1999-2000. He was also named as a member to the new council to address technology issues in market research.

**Howard Willens** has been named president of *Mature Marketing & Research*, Boston.

**Ed Cohen** has been named director, domestic radio research, at the *Arbitron Company*, New York.

**Denise Rhinehart** has been named vice president and director of the Econometrics Group at *Decision Analyst*, Arlington, Texas.

**Esther Young** has joined *Quality Controlled Services*, St. Louis, as branch manager for the company's Appleton, Wis., office. **Robert Linden** has joined the firm's St. Louis office as an account representative.

**Jim Stone** has been named vice president of *Maritz Marketing Research's* newly-formed research and development department. He was also named president of the international research and marketing sci-

ences departments. **Catherine Dudmesh** of *Maritz/TRBI* in London has been named global director of mystery shopping. **Amy Populorum** has been named assistant manager at the *Maritz Telecommunications Research Group*. She will be based in Chicago. **Joe Retzer** has joined the *Telecommunications Research Group* as director of marketing sciences.

**John Ball** has joined *Thompson Lightstone & Co.*, a Toronto research firm, as vice president and director of business development.

**Marilyn Goldman** has joined *RI Conway/Milliken Associates*, a Chicago research firm, as senior vice president.

*Flake-Wilkerson Market Insights*, Little Rock, Ark., has named **Randy Hanson** vice president and chief methodologist. **Dawn Adams** project director, and **Kevin Ennis** programmer.

**Lori Laflin** has joined *CJ Olson Market Research*, Minneapolis, as director, data processing.

**Greg Moore** has joined *TMR Inc.*, a Parsippany, N.J., research firm, as vice president/general manager of the company's fourth interviewing facility, which is scheduled to open this fall. Moore will join the facility management team of **Michelle Adore**, **Michael Felderman**, and **Jamie Jurgaitis**.

**David Reibstein** of the Wharton School at the University of Pennsylvania has been named to a two-year term as the executive director of the *Marketing Science Institute*, a Cambridge, Mass., non-profit center for research in marketing.

**Nicole Brandon** has joined *Eagle Research* as qualitative manager of the firm's Atlanta focus group facility.

**Ariadne DeVizio** has been promoted to research analyst at *Innovative Media Research*, Hoboken, N.J. In

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addition, **Nancy Zafft** has been named research analyst and systems manager, and **Marlene Tammy Haynes** has been promoted to office manager.

*ICR/International Communications Research*, Media, Pa., has promoted **Melissa Herrmann** to vice president of social science research.

*Action Research*, Burlington, Vt., has promoted **Richard H. McCoy** to director of research.

**Dale Florio** has been elected to the board of directors of *Opinion Research Corp.*, Princeton, N.J.

**Julia Beaver** has been named vice president of the Competitive Tracking



Beaver

Services division of *BAIGlobal Inc.*, a Tarrytown, N.Y., research firm.

**Sue Nielsen-McAdams** has been named president of *Herron Associates, Inc.*, an Indianapolis, Ind., research firm. The firm also announced the following promotions: **Paul Jorgensen** to vice president; **Michelle Davis** to coordinator of phone and field operations; and **Kelly Toles** to qualitative manager.

*World Research*, San Jose, Calif., has named **Peter J. Auditore** vice president of syndicated research services.

**Merrill Dubrow** has joined *bizrate.com*, Los Angeles, as manager, client development.

*NFO Prognostics*, Palo Alto, Calif., has appointed **Tina Weinfurther** executive vice president, responsible

for all operations for the firm. She will continue to lead the firm's consulting services division, which she launched last year.

*Cheskin Research*, Redwood Shores, Calif., has named **Christopher Ireland** as its new CEO. Ireland was the founder of ImageNet, a qualitative and ethnographic market research firm which merged with Cheskin Research in 1996. Prior to assuming her new role, Christopher shared management responsibilities with her partners **Davis Masten** and **Darrel Rhea**. Masten and Rhea remain in their positions as principals of the company.

*The Strategis Group, Inc.*, a Washington, D.C., research and consulting firm, has named **Samuel H. Book** acting president and CEO, succeeding **Andrew Roscoe**, who resigned to pursue other opportunities.

*Market Perspectives, Inc.*,

Framingham, Mass., has appointed **David Kaufman** vice president of sales for custom research.

**Chris Efken** has been hired as senior research associate at *Doyle Research Associates, Inc.*, Chicago.

*Hispanic & Asian Marketing Communication Research, Inc.* (H&AMCR), Belmont, Calif., has named **James H. Owen** director of research services. In addition, **Isabelle Martineau** has been named data production and programming manager for quantitative projects, and **Luis Vergara** has joined the qualitative research team as project manager for English and Spanish language projects. The firm also announced that **Charo Aguila Mouritzen** will moderate for H&AMCR's research projects in the U.S., Mexico and Latin America.

*Action Research*, Burlington, Vt., has promoted **Richard H. McCoy** to director of research.

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## Data Use

continued from p. 14

aspect of satisfaction accounts for purchases. Each regression coefficient measures the relative (metric) importance of each aspect of satisfaction in increasing purchases, assuming that satisfaction causes purchases. (Since purchases may have some impact on satisfaction, we need two years of data to prove causality.)

In a hypothetical example, we measure satisfaction with the performance of the SBU using the same five-point scale as shown above. Simple regression analysis of "Timely Delivery" against "Purchases" generates a regression coefficient of .50. All else being equal, we expect revenues to increase 50 percent over the same time period if the average customer converts from being "Very Dissatisfied" to being "Very Satisfied" with "Timely Delivery." If satisfaction improves by one level, rather than five levels, we expect the revenues to increase 10 percent, rather than 50 percent.

Some aspects of satisfaction may be highly correlated with one another. For example, customers may perceive that "Timely Delivery" and "Product Availability" are identical. If both aspects of satisfaction have a regression coefficient of .50 with purchases, their combined effect on revenue overlaps. Thus, if customers increase their average satisfaction with both "Timely Delivery" and "Product Availability" by one level, we expect revenues to increase

10 percent, rather than 20 percent.

We can prioritize aspects of satisfaction by their impact on revenues and classify the most important aspects as key drivers of revenues for the SBU. The wise company improves important aspects in which its performance is relatively low. The priority of each aspect for improvement depends upon the aspect's importance and customer dissatisfaction with the SBU's performance on the aspect. The relative priority of each aspect for improvement is measured as  $\text{Importance} * (1 - \text{Performance})$ .

Quadrant analysis visually compares the importance of aspects to the company's performance on each aspect. In simple terms, if an aspect is important and the company's performance on the aspect is strong, the company should promote this aspect as a comparative advantage. If an aspect is important and the company's performance is weak, the company should improve this aspect. If an aspect is unimportant, the company should maintain its current performance, whether its performance on the aspect is strong or weak.

### 3. Linking aspects of satisfaction to revenue for SBUs.

The two previous examples are only relevant if the customer satisfaction survey collects data on the purchases of each respondent. If the survey does not collect this data, we can still link aspects of satisfaction to revenues if we have data on purchases by groups of respondents. For example, the company may group respondents by their location and know the revenues that are generated by each location over a certain period of time. This approach is relevant for any set of SBUs such as sales regions, branches of a company, or franchises of a chain.

The first step is to group the respondents by their SBU and to average the responses of the respondents in each SBU. As a result, our data are at the group level, rather than at the respondent level. For example, if the company has 50 locations, each with about 1,000 respondents, our sample size is 50 locations, rather than 50,000 respondents.

The next step is to insert the revenues for each SBU in our data and to repeat the preceding analysis at the group level. In this approach we use average group scores, rather than respondent scores, as the independent variable, and SBU revenues, rather than respondent purchases, as the dependent variable. As before, the regression coefficient measures the relative (metric) importance of each aspect of satisfaction for increasing revenues. As a result of this analysis, we can prioritize improvements for each SBU by the expected impact of each aspect on the SBU's revenues.

We can use our data to compare SBUs in several ways. The quality index provides an overview of the SBU's performance by aggregating  $\text{Performance} * \text{Importance}$  for each aspect of satisfaction. We can benchmark the performance of each SBU compared to the average performance of the SBUs. Significant differences between the performance of an SBU and average performance indicates the SBU's strengths or opportunities for improvement.

Figure I demonstrates how quadrant analysis can compare the importance of each aspect to each SBU's performance



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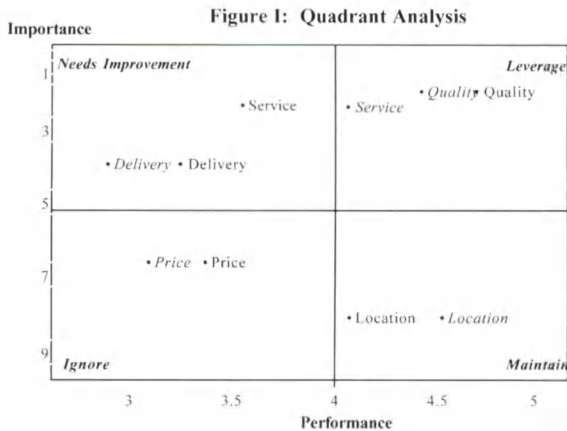
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(and to average performance) on the aspects. In quadrant analysis, the vertical axis measures the importance of various aspects of satisfaction while the horizontal axis measures SBU performance on these aspects. In this example, italic type indicates the performance of a specific SBU and

regular type indicates for average performance of all SBUs being evaluated. In this example, the most important aspects are "Quality," "Service," and "Delivery," while the SBU performs strongest on "Quality," "Service," and "Location." Since this SBU has a strong performance on the important aspects of "Quality" and "Service," these aspects are the SBU's comparative advantages. When we compare the positioning



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In this example, the most important aspects are "Quality," "Service," and "Delivery," while the SBU performs strongest on "Quality," "Service," and "Location." Since this SBU has a strong performance on the important aspects of "Quality" and "Service," these aspects are the SBU's comparative advantages. When we compare the positioning

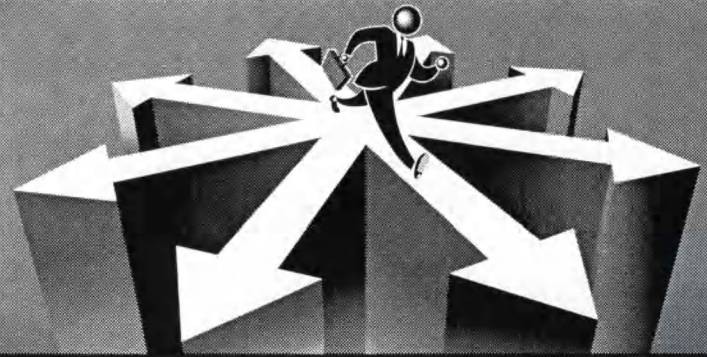
#### 4. Linking employee attitudes to revenue for SBUs

Similarly, we can link employee attitudes to revenue if we have data on the attitudes of the employees working at each SBU and the revenues of each SBU over a certain period of time. Since employee attitudes may impact SBU revenue or SBU revenue may impact employee attitudes, we need two years of this data to prove causality.

The first step is to average employee attitudes for each SBU and then insert the revenues for each SBU in our data. Then we link employee attitudes with SBU revenues using simple regression analysis. In this analysis, the independent variable is an employee attitude and the dependent variable is the SBU revenues. The regression coefficient measures the relative (metric) importance of each employee attitude on SBU revenues. As a result of this analysis, we can prioritize improvements in employee attitudes by their expected impact on the revenues of each SBU.

We can compare SBUs overall with the quality index

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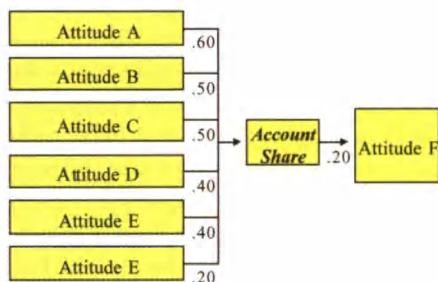
and compare an SBU's relative specific employee attitudes with benchmarking. For example, significant differences between the SBU's performance and average performance benchmark the SBU's strengths or opportunities for improvement. As before, quadrant analysis can compare the importance of each aspect relative to each SBU's perfor-

ming staff affect and are affected by revenues and overall satisfaction. Since the results are confidential, the letters in the figures refer to specific employee attitudes.

### Maximize impact

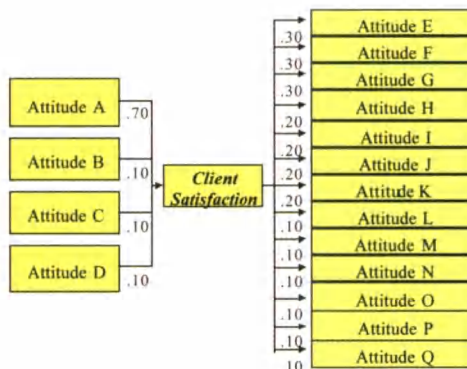
These approaches measure the impact of specific improvements on overall satisfaction and revenues. Any

**Figure II: Marketing Staff Attitudes & Account Share**



Causal Relationships Identified by Significant ( $\alpha \leq .05$ ) R<sup>2</sup> Coefficients


**Figure III: Marketing Staff Attitudes & Client Satisfaction**



Causal Relationships Identified by Significant ( $\alpha \leq .05$ ) R<sup>2</sup> Coefficients

mance (and to average performance).

If the data is available, we can repeat this analysis for employees in each functional specialty. One company, a leader in its industry, used this approach to link employee attitudes and customer satisfaction to revenues. For example, Figures II and III show how the attitudes of its mar-

company can use the first approach to linking research to revenues, while the other approaches require data on a set of SBUs. The cost of these approaches is minimal if a company has already collected the data. All approaches are designed to maximize the impact of specific improvements on company revenues. 

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## La Quinta

continued from p. 17

the minute they drove up to the property," Gard says, "and we take them back through the experience. When you drove up, was the exterior appealing? Were you greeted warmly? Were your reservations in order? Was the staff friendly and helpful? We put the questions right in the order they experienced things so that they can really reconstruct it from memory, because people are probably getting the survey about 10 to 17 days after checkout. That approach works very well for us."

The goal is 75 completed surveys per location per quarter. Gard estimates the return rate is about 26 percent.

In addition to the computer files, CRI produces a property-level printed report, which gives managers a one-page snapshot of each location's performance and also includes more in-depth information on subsequent pages. On the first page they can see how their location rates overall, one-year trend data, and then a list of areas in which their location performs at higher levels and at lower levels than most other La Quinta Inns. CRI also developed a Guest Loyalty Profile which uses responses to questions on intent-to-return and the comprehensive performance of the property to create a graphic indication of guest loyalty.

### Best practices

The survey gives La Quinta a way to develop a list of best practices by

looking at the properties that score highly and examining how their practices differ from properties that don't do so well. (It's been effective enough to allow La Quinta to eliminate its mystery shopping program.) Also, the scores are incorporated into manager bonuses — not at a high percentage, but enough to add a little extra incentive to strive for excellence.


The quarterly time frame works well, but everyone involved must realize that change doesn't happen overnight, Gard says. If a problem crops up, it may take one or two quarters to turn things around. "You want to have the survey data be timely so that people can act on it, but you understand that the process to change things takes time. Weekly reports don't make sense because you can't change things that quickly. For our business, sending the results out quarterly makes good sense."

The printed reports haven't changed much since the surveying began, though some adjustments have been made to help managers get more from the data. Gard says general managers used to call him wondering why their scores had gone down despite their efforts to improve things. In many cases, they weren't looking at problem resolution scores and acting to improve in that area. "I looked at their reports, and invariably, they tended to look at the overall rating and some of the key things, but they weren't looking at service areas like problem resolution. We were actually not producing graphs on the problem resolution section of

the survey and we went in and changed that so they now can see how they are doing in those areas. A lot of hotels have improved in that regard."

The key drivers of satisfaction have been pared down to five or six areas, Gard says, but all seem to have equal importance. "It's the obvious things like the staff, room cleanliness, maintenance. But the way the regression came out, it's not like one of those is more important than the others. They're all equally important, so if you let one of them go your score will go down. That's one of the concepts behind a limited-service hotel like La Quinta: you have to cover five or six bases well and it's not complicated but you have to keep them in balance."

### No more paper?

The desktop system has been tested with general managers and regional managers and plans are underway to install equipment so that all managers can access the data. If things go smoothly, perhaps one day the paper reports will be eliminated, Gard says. Will another long-standing research practice fall by the wayside? 

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## Questionnaire content

continued from p. 19

ed through focus groups and one-on-one or small-group interviews. The remainder of this article will discuss the techniques you can use to develop an effective survey instrument. Whether you use focus groups or one-on-ones or some combination will depend primarily on the people you need to talk to (where are they, who are they and so on). For more help choosing the appropriate qualitative research method, contact a reliable research supplier.

### Using focus groups and one-on-ones and small-group interviews

In the remainder of this discussion we will use the following terms: "construct," "content area," and "item." A construct is a concept that is being used for scientific purposes (and we all know that designing surveys is a science). It represents an intangible idea, such as satisfaction or happiness. You can't see it per se, but you can see the implications of it. For example, you can't see happiness but you can infer the state of someone's happiness by looking at them and noting their behaviors. In survey research, the content of your survey will be designed to reflect certain constructs. Because constructs are usually complex, and often reflect more than one idea, a survey content area refers to a group of items that reflect one idea. For example, if we are trying to measure the satisfaction of airline passengers, we know that there are many things that could affect their satisfaction: registration and ticketing, baggage handling, timeliness of arrival and departure, in-flight amenities and so on. If we want to accurately gather a complete picture of these passengers' satisfaction with the airline, we

need to ask them questions about each of these content areas. Finally, the items are the individual questions for which you would like respondents to provide information. Each content area will be made up of several items.

When you have chosen to conduct qualitative research to develop a survey instrument, one of the first decisions you will need to make is: Who should we talk with to determine the relevant constructs and content areas? There are five potential groups of respondents: customers, employees, executives, lost customers, and prospects or non-customers. Each group will provide a unique perspective. Customers, lost customers and prospects can talk about what's important to them; employees, particularly those on the front lines, can provide information on what satisfies or dissatisfies customers; and, executives will provide information on long-range goals (also, it's nice to keep them in the loop to gather support for your project). It is critical, at the bare minimum, to talk to customers.

There is a wide variety of questions you can ask in the focus groups, but the key to a successful focus group is to remember that it is, in essence, a group discussion. The moderator is there to guide the flow of the conversation, but the real information comes from having participants think about the responses of others and comment on them. Ask customers what makes them happy in a particular situation and what makes them unhappy. Ask them what would cause them to change providers. Ask them what made them try you in the first place and if their initial perception was correct. Ask them about your competitors' strengths and weaknesses. Finally, get specific examples of positives and negatives and make sure they clarify anything ambiguous. Rather than "I had

to wait a long time," ask them to tell the story that surrounds their statement: how long did they have to wait, what did they do while waiting, how did it make them feel, and so on. Be sure you are capturing all of these great ideas on a flip chart or using a tape recorder.

Returning to our airline industry example, groups could be conducted with current customers (perhaps some with business travelers and some with pleasure travelers), with front-line employees including ticket agents and attendants, with people who prefer other airlines, and with executives. It's generally easier for participants to focus on problems rather than on what has gone well; however, encourage them to think carefully about positive experiences. Speaking from personal experience, we recall being delayed in Denver with a flight we thought would never leave. The United Airlines gate agents kept the waiting passengers entertained with a group game of trivia. The first to shout out the correct answer got a \$50 travel voucher. What impressed us was not the token reward, but rather that the airline considered the passengers to be their responsibility even before boarding the aircraft and showed some concern for our inconveniences.

### Now what?

After conducting the focus groups, the real work begins. The discussions will need to be analyzed. To examine the results of the qualitative research, take a look at the stories you were told—think about cutting up transcripts or highlighting them to isolate specific stories. For each story you hear, ask yourself, "What are they really saying?" For each unique story you hear (some may overlap), complete one of the following sentences:

- To delight this customer, (this must happen or this condition must be satisfied).

Again referring to our airline example, we may have heard several stories from passengers about delays, cold or inedible food, or lost luggage and from those have generated specific statements such as:

- To delight this customer, the luggage must arrive with the flight and be delivered within x minutes of de-planing.

- To delight this customer, the ticketing agent must proactively offer flight options.

- To delight this customer, the flight

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should depart on time (actually leave the ground, not just push back from the gate).

- To delight this customer, the seating area must be clean.

And so on.

After you have generated your statements, group similar ones together and remove any redundancies. Look at the groups you have put together. What is the theme that holds each group together? These themes will become your content areas. This can be hard to do at first. Essentially, you need to take a step back from each of the specific statements and determine the underlying idea behind them. For example, if you heard stories about rude flight attendants, rude ticket agents, rude customer service reps, and lack of customer service support for late planes, you have probably identified a content area of customer service. Each of those stories talks about different groups of people, but they all deal with customer service.

Examine your groups and your content areas. Does it seem that you have covered everything and, conversely, do some of your areas overlap? Refine these as necessary. The content areas become the sections of the survey. Additionally, all those statements you created become the core of your survey items. In our airline example, the following information was gathered. To delight the customer, the ticketing agent must:

- be able to answer questions and provide solutions,
- proactively offer flight options,
- explain the carry-on requirements,
- be courteous and polite; and,
- conduct the transaction professionally.

The content area is "satisfaction with ticketing agent" and, using our statements, the questions write themselves:

How satisfied are you that the ticketing agent you spoke with . . .


- . . . was able to answer your questions?
- . . . provided solutions to your travel restriction problems?
- . . . offered flight options?
- . . . explained the carry-on requirements?
- . . . was courteous and polite?
- . . . conducted the transaction professionally?

(Sorry, but questions about which scale to use are beyond the scope of this article.)

### Most cost-effective

In conclusion, although qualitative research can seem like a costly way to generate survey content, in the long run it can be the most cost-effective. Rather than relying on gut instinct or previous studies that may or may not apply to your situation, you are "asking the experts." Through this process you are increasing confidence that the survey items you generate are good items and that they reflect attributes that are important to customers. Also, this process should help you marshal employee and

executive buy-in to the survey process, particularly if their opinions were sought up front. Furthermore, studies have shown that survey response increases when the items are important to the customer. This step can help you achieve a higher response rate than you might have achieved otherwise.

Finally, one last instruction — now that you have gone through all this work to develop your survey content, make sure that you make the best use of the information you collect and actually act on the findings! 

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## Research Industry News

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New York, conducted four global focus groups on behalf of the New York American Marketing Association. Each group comprised respondents from four continents and the total project covered 20 countries. Respondents entered into a global discussion on-line in English moderated by Ira Goodman. The groups were also taken to a Web site in real time to evaluate a new product and service. The groups were conducted in the early morning and evening to bridge the world's time zones.

**The M/A/R/C Group**, Irving, Texas, has sold its minority ownership position in Digital Marketing Services, Inc. (DMS), an on-line incentive marketing and research company, to America Online Inc. for an undisclosed cash payment and a multiple year continuing access agreement. DMS was founded in 1995 as a joint venture between The M/A/R/C Group and America Online.

**National Computer Systems**, Minneapolis, has secured two contracts with the Veteran's Health Administration (VHA). The VHA's Center for Health Quality, Outcomes and Economic Research has contracted with NCS to survey 1.5 million veterans about their health status. NCS was also awarded a three-year contract with the VHA's National Customer Feedback Center to help implement a customer satisfaction/customer feedback program.

**IntelliQuest** has signed an agreement to merge with **Millward Brown**, Fairfield, Conn. IntelliQuest will be the technology practice within Millward Brown, which is a division of Kantar, the U.K.-based global research and information group within WPP, a communications firm.

Horsham, Pa.-based **Taylor Nelson Sofres Intersearch** (TNS Intersearch), the U.S. headquarters of the Taylor Nelson Sofres (TNS) group, has acquired **Market Development, Inc.**, a San Diego, Calif., research firm. MDI will operate as a TNS Intersearch Business under the direction of Bruce

Shandler, president and CEO of Taylor Nelson Sofres Intersearch. The current owners, Loretta H. Adams, Henry Adams and Roger Sennott, will stay with the company. In other news, TNS Intersearch has also acquired **QCR Associates, Inc.**, a Modesto, Calif., medical market research firm.

**WMB & Associates**, an Apopka, Fla., research firm, now supports advanced segmentation studies using SPSS's AnswerTree. AnswerTree incorporates several classification models to analyze relationships then display the results in decision tree formats. For more information call William M. Bailey at 407-889-5632.

**ACNielsen Corporation**, Stamford, Conn., has acquired full ownership of **Market Decisions**, a joint-venture business that provides controlled market and in-store testing for both new and established consumer products in the United States. ACNielsen purchased 55 percent of Market Decisions from Cincinnati-based Market Decisions, Inc. ACNielsen had owned a 45 percent share of the joint venture since 1994, when it was formed. Richard C. Seal, chief executive officer of Market Decisions, will continue to lead the business, which will now be known as ACNielsen Market Decisions. Separately, ACNielsen Corp. reported diluted earnings per share of \$0.35, an increase of 29.6 percent, on net income of \$20.9 million, which was up 29.9 percent. Reported earnings were reduced by an after-tax expense of \$2.1 million, or \$0.04 per share, for Y2K computer software modifications, and a negative, after-tax impact of \$1.3 million or \$0.02 per share, as a result of foreign currency translation.

Chicago software maker **SPSS Inc.** announced results for the quarter ended June 30, 1999: net revenues of \$33.3 million and diluted earnings per share of \$0.35.

**NFO Worldwide, Inc.**, Greenwich, Conn., has reported second-quarter and six-month results. Revenues for the second quarter increased 84 percent to \$119.4 million from \$65.0 million for the same period last year. Operating income increased 49 percent to \$12.6

million from \$8.4 million a year ago. As a result of increased interest expense and a higher effective tax rate, both associated with recent acquisitions, net income for the quarter increased 17 percent to \$5.1 million from \$4.4 million reported last year. Diluted earnings per share increased 15 percent to \$0.23 per share from \$0.20 per share a year ago. The second quarter's and six month's results include the results of Infracast Burke, which was acquired on November 20, 1998. For the six months ended June 30, 1999, revenues increased 96 percent to \$225.8 million from \$115.2 million in the same period last year. Operating income increased 55 percent to \$20.7 million from \$13.3 million. Net income increased 17 percent to \$8.0 million from \$6.8 million a year ago, while diluted earnings per share increased by 13 percent, to \$0.36 from \$0.32.

**Socratic Technologies** has moved to new offices at 2505 Mariposa St., San Francisco, Calif., 94110, Phone 415-430-2200 or 800-576-2728. Fax 415-430-1200.

**Atkins Research Group** has opened a new, four-suite Los Angeles focus group facility on the corner of Wilshire & Highland on Museum Row. For more information call Lynn Atkins at 323-933-3816.

**United Information Group** (UIG) recently signed a three-year global agreement with SPSS MR. Under the terms of the contract, the group will use the full range of SPSS MR software products. This agreement standardizes the use of SPSS software across UIG member companies worldwide. UIG is the market research and information division of United News & Media, an international media and information group operating. The division includes Audits & Surveys, Mediamark Research, Market Measures and NOP. Separately, UIG has acquired Strategic Marketing Corporation (SMC), a Bala Cynwyd, Pa., market research company, for \$18 million.

Chicago-based **SPSS MR**, the market research operating unit of SPSS Inc., recently signed a contract with Dallas-

based **M/A/R/C Research, Inc.** The agreement expands the range of SPSS MR software used by M/A/R/C in its survey design, data collection and analysis.

**The NPD Group, Inc.**, Port Washington, N.Y., and GfK AG, previously partners in INTELECT ASW, have acquired INTELECT ASW company shares formerly held by **Audits & Surveys Worldwide, Inc.** (ASW). With the transaction, NPD and GfK become sole partners in the venture, which has been renamed NPD INTELECT. NPD INTELECT is a leading market tracking service that provides sell-through information and analysis for the consumer electronics, information technology and appliance industries.

**Total Research Corporation**, Princeton, N.J., has announced the introduction of Total e-Survey, a new product which combines the firm's market research technologies and international expertise with web survey capability. The on-line surveys will be offered as part of Total Research's complete, integrated data collecting and analysis programs. Total e-Survey, to be located at Total Research's web site, [www.total-res.com](http://www.total-res.com), will include strategically designed surveys on topics of current interest as well as client-specific programs. Participating clients in a broad range of industries from life sciences to telecommunications will be able to privately access a variety of real-time reports on-line, including aggregated data and summary reports.

**Spiller Research Group**, St. Petersburg, Fla., has launched a new division, Spiller Advanced Research, which will specialize in the health care industry.

The board of directors of **The M/A/R/C Group**, Dallas, declared a regular quarterly cash dividend of \$0.075 per share.

**On2.com Inc.**, a New York developer of a network of Web channels for broadband-enabled consumers has partnered with Burke ICE, the information, communications and entertainment division of Cincinnati-based Burke, Inc. to conduct high-bandwidth market research, enabling on-line advertisers

and content providers to measure and capture consumer preferences, attitudes and perceptions in the broadband environment.

**Opinion Research Corporation**, Princeton, N.J., reported that revenues and operating income for the second quarter and for the first half of the year set new records and net income and earnings per share showed significant increases. Net income for the second quarter of 1999 was \$595,000, an increase of 29 percent compared to \$462,000 a year ago, excluding extraordinary second quarter charges of \$90,000 in 1999 and \$150,000 in 1998 in connection with debt refinancings. Fully diluted 1999 second quarter earnings per share were \$0.14, an increase of 40 percent compared to \$0.10 in the second quarter of 1998, excluding the extraordinary charges. Net income for the first half of 1999 was \$1,147,000, an increase of 29 percent compared to \$887,000 a year ago, excluding extraordinary second quarter debt refinancing charges. Fully diluted earnings per share for the first half were \$.27, an increase of 35 percent compared to \$.20 in the first half of 1998, excluding the extraordinary charges.

Laurel, Md.-based **iAtlas Corporation**, developer of filtering technology for Internet searching, has partnered with New York-based USA-

DATA.com to deliver Web-based business research analysis to organizations by incorporating iAtlas' patent-pending InfoLens Research technology on the USADATA.com Web site ([www.usadata.com](http://www.usadata.com)). The InfoLens will allow USADATA.com visitors to conduct focused Web-based business research via the Internet, based on business demographics, geographic location, and/or industry-specific categories. Under the terms of this agreement, USADATA.com is also licensed to resell iAtlas' InfoLens market research tools.

**Publications Resource Group, Inc.** (PRG), North Adams, Mass., has added several research firms to its list of partners. Richard K. Miller & Associates, Inc., Education Market Research, Food Technology Intelligence, Inc., Leatherhead Food Research Association, Strategy Research Corporation and Takeda Pacific, Inc. have signed up to allow PRG, Inc. to sell their market research reports and newsletters through the [www.prgguide.com](http://www.prgguide.com) Web site.

**DoubleClick Inc.**, an Internet advertising firm, has announced a partnership with Millward Brown Interactive, a San Francisco research firm, under which DoubleClick will use Millward Brown Interactive's Audience Audit surveying product on its Select Network sites.

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Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 612-854-5101. Fax 612-854-8191. Or visit [www.quirks.com/media/moderator.html](http://www.quirks.com/media/moderator.html).

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(See advertisement on p. 31)

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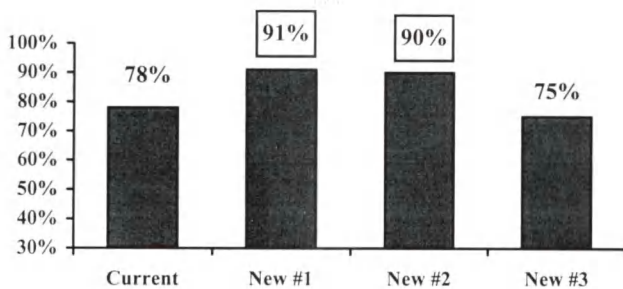
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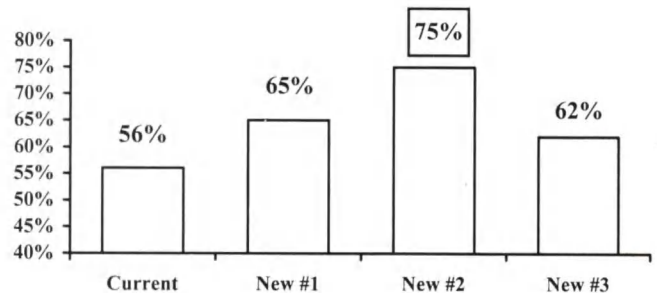
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## Corrections

Please note the correction to the following listing from the 1999 Omnibus Research Directory:

In the listing for Mature Marketing & Research on p. 69, the correct e-mail address should be [MMRHARRIS@aol.com](mailto:MMRHARRIS@aol.com).

## War Stories needs your help!

If you have a good research-related anecdote or know someone who does, contact War Stories compiler Art Shulman at 818-782-4252 or at [artshulman@aol.com](mailto:artshulman@aol.com).



## Trade Talk

continued from p. 114

payment.

The interviews have a set structure, but the main goal is to give the respondents freedom to talk in-depth about a host of service issues, thereby showing clients how the customer defines good service and where service gaps may exist. For example, in a section on critical needs, the respondent is asked to detail their critical needs and give instances of very good and very unacceptable service. "In some satisfaction surveys, customers give very general comments, such as, 'The equipment is not user-friendly.' But that doesn't take you far enough. You need to really probe and ask questions. Is the weakness related to training, manuals, or the operator interface? Is this an issue for regular operation or just maintenance? What is an outstanding example of user-friendly equipment? What should be changed? Does this weakness apply to all the equipment or just one model used?" Thrower says.

Further, it's key to define good and bad performance in ways that can be measured, such as the time it takes for a rep to arrive at the company to resolve a problem.

Upon hearing comments from the interviews, rather than engaging in some kind of customer service game of Twister, in which the company goes into all sorts of gyrations to please individual customers, a better approach is to determine if the issues are related to inconsistent delivery, corporate procedures, staff training, weak business processes, or individual communication skills, so you can put in place practices that have the best chance of pleasing the most people. For example, large customers of one company said during the in-depth interview that they wanted more face-to-face contact with the company's sales staff, to discuss goals for the next year, etc. Perhaps every customer would appreciate that kind of meeting.

It's important, however, Thrower says, to separate behavior issues from process issues. In some cases, dissatisfaction is caused by a sales rep, whose interpersonal manner just doesn't agree with the customer. In others, it's the system the company uses, to handle service calls or send out invoices,


for example. "You may hear comments about some aspect of service, say complaint management, being inconsistent. If they seem to be more behavior related, that's a training issue, and that's something you need to address internally," Thrower says.

### Goodwill

A sometimes-overlooked benefit of talking to customers is the goodwill you earn by opening up the dialog in the first place. (For the interviews it conducts, GBA identifies the firm sponsoring the research.) If you have a solid relationship with your customer, they will see the mutual benefit in strengthening it and will be happy to tell you how to do that. You get to look great for asking them for their opinions, they get to tell you how they'd like things to be. That's a win-win if I've ever heard one.

But whether it's good or bad, you have to act on the information.

When your customers speak their mind, it can be hard to ignore. Thrower relates one example where GBA presented the client company with lengthy transcripts of the in-depth interviews. "They were mesmerized. They read them word-for-word. Previously, the research reports just sat on the shelf. But here were their customers talking about what they cared about, saying that the company wasn't responsive enough."

That's the voice of the customer at work! 

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# Trade Talk

By Joseph Rydholm, QMRR editor

## Go in-depth to get the voice of the customer

**M**easuring satisfaction is a noble pursuit. But unless you have some idea of how your customers define satisfaction, you're not getting the whole picture. You may find out that 68 percent of your customers classify your sales force as excellent. But what are their criteria? And do their criteria match yours?

To find out, listen to the voice of the customer. There are myriad ways to weave this powerful and much-talked about force into your products and processes. One company, Gordon Bailey & Associates (GBA), a Duluth, Ga., marketing, communication and research firm, conducts in-depth telephone interviews with customers of its business-to-business clients as a part — albeit a critical one — of a multifaceted customer satisfaction program.

Benchmarking is an important early phase in the development of a CS process, but it won't give you the details on why ratings are high, low or how to improve, says Susan Thrower,

a GBA senior research executive. That's where research — and in-depth interviews in particular — can help.

GBA shoots for 30 completed interviews with customers in a range of groups. Depending on the client's needs, those groups can include key customers, average and sophisticated customers, and those whose business with the client firm has fallen off gradually. If you survey 30 customers with varied criteria, you should be able to get insights into what works best.

### Freedom to talk

GBA takes a number of steps to aid respondent cooperation, including scheduling the interviews at the respondent's convenience and faxing questions in advance. As a result, some respondents have talked for up to two hours, without

continued on p. 113

### Dilbert

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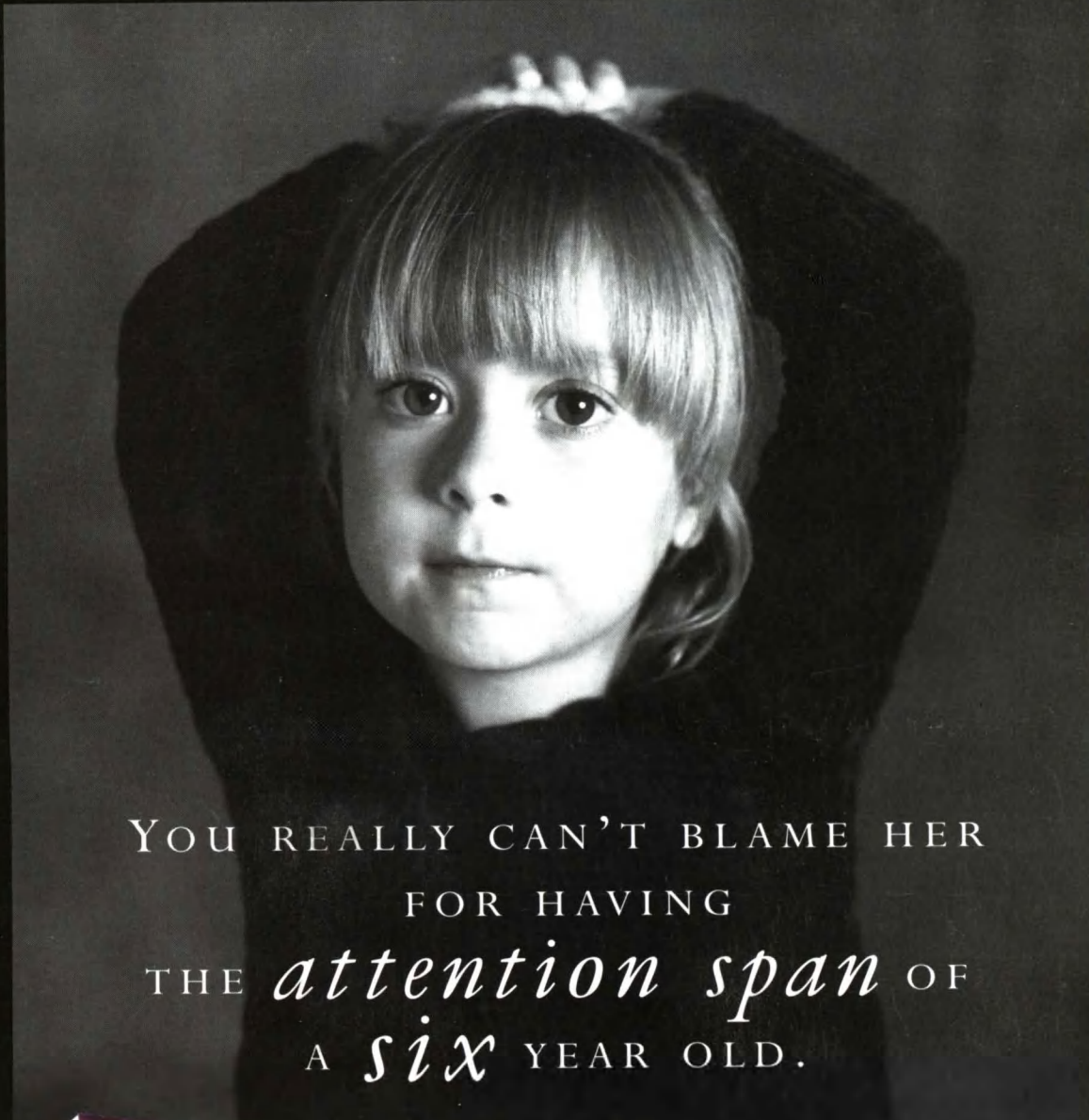
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