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Marketing Research Review

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October 2000

Customer satisfaction research

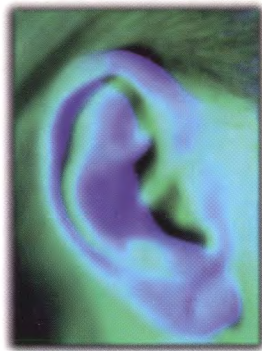
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Marketing Research Review

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Adults love Halloween too

Sixty-one percent of Americans have someone in their household who participates in Halloween festivities, according to a Maritz Poll from Maritz Marketing Research Inc., St. Louis.

While Halloween is typically thought of as a holiday for small children, 39 percent of those getting caught up in the Halloween hoopla are 45 and older. The survey also

ing out candy, 49 percent; while taking children trick-or-treating, 27 percent; work, 26 percent; school, 7 percent.

Almost half of respondents (48 percent) also have children in their household that will dress up in a disguise. Half of them will buy their



showed that participation increases slightly with income: 75 percent of respondents making more than \$65,000 annually celebrate the scary event.

As October 31 approaches, there is a good chance you might see an adult sporting *Star Wars*-inspired apparel, an Austin Powers velvet suit, or even WWF spandex. That's because 30 percent of adults celebrating Halloween said they wear costumes, the biggest group (65 percent) being 18-44 years old.

Following is a list of where they plan to don their Halloween ensembles: parties, 59 percent; while giv-

getup and their children's, while 23 percent make their holiday attire.

With all the candy, costumes, parties, and decorations that make up the Halloween celebration, it's easy to see how the typical respondent spends about \$40 on this holiday. Close to one-third (29 percent) of those participating in Halloween festivities spends more than \$50. The biggest group of spenders? Twenty-

Travelers hate to wait

Although some American business travelers brush-off the recent bad press about airline performance and travel delays as "business as usual," most say that these and other events during business travel are quite stressful. According to a recent national survey of 1,000 U.S. households conducted by TNS Intersearch, Horsham, Pa., topping the list of travel stress factors is waiting in line. Fifty



percent of those surveyed admitted that waiting in line causes stress while traveling. Americans also overwhelmingly agreed that flight or train delays (42 percent), bad weather (40 percent), travel cancellations (37 percent) and overbooked planes (33 percent) top the list of travel stress factors.

Other causes of stress include: keeping up with personal life, 27 percent; driving, 26 percent; keeping to a schedule, 26 percent; making your flight or train, 25 percent; driving in unknown areas, 24 percent; checking or claiming bags, 22 percent; packing, 21 percent; carrying luggage, 20 percent.

The study also revealed that men and women react differently to certain travel-related factors. While overall, 41 percent of Americans traveled on business away from home during the past year, more men than women traveled (53 percent of men traveled in the past year versus 30 percent of women). The most pronounced difference between men and women relates to waiting-in-line. Twice as many men as women reported that waiting in line is the most stressful aspect of business travel. Additionally, more men find it challenging to keep up with their personal lives. Other the other hand, more women than men find their stress levels rising highest during packing, when flights or trains are delayed and when they are carrying luggage. For more information visit www.intersearch.tnsfres.com.

nine percent of those spending more than \$50 are 25-34 years old. Results are based on telephone interviews

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Names of Note

Hilary DeCamp has been named director of research services for St. Louis-based *Maritz Marketing Research Inc.*'s Los Angeles division. In addition, **Jeff Laack** has been named senior research manager of Maritz's telecom research group; **Geoff Roper** has been named account manager for the St. Louis division of the firm's North American operations group; **Joe Ziegler** has been promoted to division vice president and director, information technology, for the automotive research group; **Jennifer Niswander** has been promoted to division vice president and director, research operations, for the automotive research group; and **Laura Kippen** has been named director of research services for the North American operations group.

Dorothy McDougall has been

named branch manager at the Philadelphia office of St. Louis-based *Quality Controlled Services*. In addition, **Wanda Myers** has been named branch manager at the firm's Los Angeles office.

Galloway Research Service, San Antonio, Texas, has promoted **Carlos Jauregui** to its research group. In addition, **John Ucab** has been promoted to telephone department director.

Zesearch, Inc., an Alpharetta, Ga., competitive intelligence firm, has named **Brian Zeman** CEO.

Marketeam Associates, St. Louis, has promoted **Vicki Thies** to vice president, field operations.

E-Tabs, a U.K.-based data delivery software firm, has named **Jonathan**

Rabson international sales director.

Michael Butler and **Jennifer Nolan**



Butler

Nolan

have been named research assistant at Syracuse, N.Y.-based *Knowledge Systems & Research, Inc.* In addition, **Patricia Kriegisch Kondapi** has been



Kondapi

named research analyst with the firm's health care team.

Tanya Markovich has been named



Markovich

Stiles

field services manager and **Scott Stiles** research assistant at *Digital Research, Inc.*, Kennebunk, Maine.

James Sorensen, vice president client services, has relocated to the Portland, Ore., headquarters of *Sorensen Associates* to serve as senior vice presi-

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Surveys examine Web purchase process

Campbell, Calif.-based Talk City, Inc., a provider of online communities and interactive services for businesses and consumers, has launched Exit Web, an online research application designed to provide real-time feedback before, during and after purchasing an item on the Web. When a customer completes or exits a purchase process, Exit Web generates a pop-up survey to capture buyers' reactions to their experiences. The surveys are customizable and can track sales motivations, customer preferences, brand image, demographic information and other factors affecting purchasing decisions. Exit Web surveys are customized to each client's needs. One survey pops up precisely when the shopper abandons

a transaction, and a different one pops up when a shopper completes a transaction. Exit Web was designed with technology that ensures the survey will not disrupt normal Web site operations. Since Exit Web uses a minimal amount of code, it can be integrated with any e-commerce site. For more information call Amy Yoffie at 908-232-2723 or visit www.rci.talkcity.com.

SPSS back for the Mac

Chicago-based SPSS has released SPSS 10.0 for Macintosh. The first Mac release of SPSS since 1995, the software features an all-new, native Mac user interface. SPSS worked with software developer Software MacKiev to deliver the new Mac version. Software MacKiev re-engineered SPSS 10.0 for Windows to run as a native Macintosh application, compatible with the

Windows version. The company also modified the user interface according to standard Macintosh guidelines to make it comfortable for the platform's users.

SPSS 10.0 is a modular, integrated product line for data access, data preparation, reporting, graphics and advanced analysis through statistical techniques. The new release updates Macintosh users to the latest version and delivers new capabilities in all areas of the product line, including: new modules; predictive capabilities for data mining; and dynamic, interactive graphics for the first time on the Macintosh. The software will also be available in a distributed analysis architecture (DAA), which provides users with improved performance with very large datasets. The server version is expected to ship in the fourth quarter of 2000.

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pearls of wisdom

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ARF WEEK OF WORKSHOPS: The Advertising Research Foundation will hold the 2000 Week of Workshops on October 16-19 at the Roosevelt Hotel in New York. The program will feature eight separate one-day workshops that will run over consecutive days (two parallel tracks) covering topics such as brand equity, loyalty marketing, and interactive media research. For more information call Ajay Durani at 212-751-5656 or visit www.arfsite.org.

INTERNET MARKETING CONFERENCE: Greenfield Online will hold its second annual Internet marketing conference, Information Edge 2000: "Smart Marketers, Online Success," in San Diego on October 16-18. For more information call Janice Caston at 203-846-5741 or visit www.greenfield.com.

QRCA CONFERENCE: The Qualitative Research Consultants Association (QRCA) will hold its 15th annual conference in San Diego on October 18-21. It will include workshops in tools and techniques, new qualitative research opportunities, and business issues and ethics. Attendance is limited to independent qualitative research practitioners and those working for market research or social research firms. For more information call 888-674-7722 or visit www.qrca.org.

ESOMAR TELECOM CONFERENCE: The European Society for Opinion and Marketing Research (ESOMAR) will hold its telecommunications conference on October 22-24 in Berlin. For more information visit www.esomar.nl.

CASRO CONFERENCE: The Council of American Survey Research Organizations (CASRO) will hold its

annual conference on October 25-27 in Acapulco, Mexico. For more information visit www.casro.org.

WEB RESEARCH TECHNIQUES: The Institute for International Research (IIR) is presenting "Mastering Web-based Surveys & Online Research Techniques" on October 25-27 at the Hyatt Embarcadero, San Francisco. For more information call 888-670-8200 or visit www.iironlineresearch.com.

ARF ENTERTAINMENT RESEARCH CONFERENCE: The Advertising Research Foundation will hold a conference on entertainment marketing and research on November 1-2 at Le Meridien Hotel, Beverly Hills, Calif. For more information visit www.arfsite.org.

SALFORD SYSTEMS SEMINARS: San Diego-based Salford Systems will hold two seminars, "Building Accurate Predictive Models with MARS" (November 1) and "An Introduction to Tree-Structured Modeling with CART" (October 30-31) in Toronto. For more information call 619-543-8880 or visit www.salford-systems.com.

SENSORY EVALUATION WORKSHOP SERIES: As part of its continuing workshop series "Issues in Sensory Evaluation," Tragon Corporation will hold a workshop titled "Quality Control and Stability Testing" from November 6-8 at the Sheraton Palo Alto, Calif. The focus of this seminar is the 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

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Intelligex, a New York-based start-up that will match buyers and suppliers of custom research in a new marketplace slated for a fall launch, has attracted several companies as participants. Yankelovich Partners, Opinion Research Corporation, and Guideline Research are among over a dozen research firms which will bid on requests for proposals from research buyers such as Arthur Andersen and 24/7 Media. Through the www.intelligex.com Web site, Intelligex's platform will aggregate and match custom research buyers with Intelligex-certified suppliers that best fit their needs and allow them to negotiate, collaborate, and transact custom research online.

Princeton, N.J.-based **Total Research Corporation** announced that its largest client has advised the company that a portion of its current marketing research project would be reduced. Work on the \$8.5 million project began in February and was scheduled to be completed in November. The amount of the reduction was \$3 million, which was scheduled to be included as part of the company's billings on this contract over a three-month period.

Looking Glass, a Denver-based marketing firm, is now offering access to its Cohorts market segmentation system at www.cohorts.com. The Cohorts system identifies 27 groups of U.S. consumers based on their demographic and lifestyle characteristics. The site includes descriptions and illustrations of all 27 Cohorts as well as case studies and marketing applications.

Minneapolis-based food company **General Mills** has formed a 50/50 joint venture with **MarketTools Inc.**, a Sausalito, Calif., research firm, as well as taking a minority stake in the company. General Mills will also be a

significant MarketTools customer, which will allow General Mills to increasingly conduct consumer research over the Internet. "Twenty percent of research at General Mills is on the Internet," said Gayle Fuguitt, vice president of the consumer insights division at General Mills, in a Reuters article on the joint venture. "We plan to expand well beyond that. We've found (the) participation rate for Internet research to be as high as 90 percent which is unprecedented. It also is a much better way to reach a targeted audience."

South-Western, a division of Thomson Learning, has announced a partnership with WebSurveyor, an Ashburn, Va., online survey technology company, to enhance their marketing textbook line. The alliance will launch with a CD-ROM bundled in the new edition of the textbook *Contemporary Marketing Research*, fifth edition.

A new Internet site, [\[cost.com\]\(http://www.atno-cost.com\), lets consumers sample and critique a variety of consumer products. The site uses technology called Trackable Internet Domain Extension \(TIDE\) which enables manufacturers to enter the site and customize their research of any possible demographic profile. Manufacturers can conduct market surveys, have products tested by members with specific demographics or from a specific geographic area and gain consumer feedback about their products.](http://www.atno-</p>
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New York-based research firm NPD is partnering with Notara, a provider of Web-based services for consumer brand companies and their licensing, sponsorship and marketing partners, to offer news, trend information, and online research services via the Internet. The partnership broadens the audience for NPD's current research reports, which are typically sold to market research executives. NPD and Notara will co-develop new research products that appeal to Notara's core audience of licensing,

sponsorship, and promotions professionals. Currently, NPD does not offer research for that marketplace. Notara will publish news, market data, trend information, and statistical updates, drawn from NPD research, via www.notara.net.

Israel-based NICE Systems, a provider of digital recording and quality management solutions for contact centers, and CustomerSat.com, Inc., a Menlo Park, Calif., online customer satisfaction measurement firm, have entered into a strategic alliance including a minority investment in CustomerSat.com by NICE. The alliance involves integration, joint development, and marketing of CustomerSat.com's solutions by NICE.

Raeleen D'Agostino Mautner has founded Italy-U.S. Connection, a research, information brokering, and cross-cultural training firm, at P.O.

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What mother never told you about linear regression

By George Butler

Editor's note: George Butler provides modeling and scoring services through Iona Investment Corp., Redwood City, Calif. He can be reached at gabee@mindspring.com or 650-365-3127.

If you think of regression modeling as unfathomable or if you had a hard time with high school algebra, this article is for you. For the others, it couldn't hurt.

Indulge me for a bit and imagine that you are given a database containing the age and income of each resident in a certain neighborhood. Your boss requests that you use this data to come up with a model for that neighborhood to estimate someone's income using their age as a predictor. An urgent call goes out for stalwart statistical help in the form of a certain Dr. Sigma over at Information Systems. Fortune smiles, the doctor is in. Doc Sigma wisely assures himself that there are no extreme values of income in the data to warp the analysis. Then he works his magic and presents you with a bona fide mathematical model: "Multiply the age in years by 971.4 and add 1536.2 and you get annual income in dollars. That's your model and it's optimal."

You are duly grateful to Dr. Sigma and get to work on a report for your boss. You use the formula to graph

income vertically versus age horizontally and admire the economy of this rule relating age to income. It's a straight line - and an optimal one, at that. The glow dims somewhat when you see that the model estimates the income of 18-year-olds to be \$19,021. (These youngsters should still be doing homework, not racking up that kind of dough.) The luster vanishes completely when you see that the estimated income for 70-year-olds is \$69,534 and that each additional year of survival means an automatic \$971 boost (hardly accounted for by Social Security cost-of-living adjustments).

Why is Sigma's formula fishy? Because it's a poor model. How could it be a poor model when it is "optimal?" It is optimal only if Sigma's assumption about the shape of the model is correct. He assumed that the correct shape was a straight line. The computer did its part by finding a best-fitting straight line of all possible straight lines, employing a revered technique harking back to Karl Gauss (1777-1855).

Catch-22

If you sense that there is a Catch-22 here, you are right.

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Getting good feedback

Online satisfaction system helps

e-commerce firm track

customer contact process

By Rajesh Nakhwa and Monica David

Editor's note: Rajesh Nakhwa is North American technical support manager at Ariba, a Mountain View, Calif., e-commerce firm. Monica David is vice president of client services at CustomerSat.com, a Mountain View, Calif., research firm.

In today's competitive climate of global e-commerce, customer loyalty is a key factor to success. Increasingly, companies are demanding immediate access to customer feedback in all aspects of their business experience. From initial purchase to product delivery and technical support, e-businesses realize that sustaining a healthy customer-oriented relationship is a full-time endeavor that requires constant feedback.

One such company, Ariba, Inc., a Mountain View, Calif., business-to-business (B2B) e-commerce platform and network services provider, is using Web-based survey tools to improve customer retention. Ariba has integrated its Vantive Enterprise Customer Relationship Management (CRM) system with the Web Survey System (WSS) of CustomerSat.com, a Mountain View, Calif., research firm, to enable its global customer-support division to collect real-time feedback, track trends, get immediate notification of less-than-satisfied customers, implement department-wide best practices procedures, and use positive responses to build team morale and customer loyalty.

Tremendous growth

On the strength of its Ariba B2B Commerce Platform - an open, end-to-end infrastructure of interoperable software solutions and hosted Web-based commerce services - the company is experiencing tremendous growth. It recently posted record revenues of more than \$80 million for the third quarter of fiscal 2000 - up 101 percent from the previous quarter and 578 percent from the same

period last year.

While Ariba can attribute its industry leadership position to numerous reasons, one key factor is its continued focus on maintaining high levels of customer satisfaction. With response centers in North America, Europe and Asia Pacific, Ariba staffs a full-service technical support team, which fields inquiries from customers around the globe via telephone, Web or e-mail. Through the use of the Vantive CRM system, Ariba assigns each customer inquiry a case number, routes it to an appropriate specialist, and professionally tracks it from initiation to resolution, at which time the case is closed.

Prior to using the Web Survey System, Ariba tracked customer satisfaction by sending quarterly e-mail surveys, asking customers who used technical support during the past three months about their support experience. As Ariba's business expanded, and with increases in the diversity and volume of customer calls, its need for a real-time feedback system grew.

With the Web Survey System and its Vantive CRM integration module, Ariba's customer satisfaction measurement program is now an integrated, real-time, two-way relationship, which has empowered Ariba to efficiently serve its growing customer base. "Customer satisfaction has been a key driver of Ariba's phenomenal growth," says Ariba CEO Keith Krach. "Online customer feedback helps us retain valued customers and

build lifelong relationships with them."

A customer service challenge

Prior to 1999, Ariba's primary offering was one product - Ariba Buyer - an e-procurement application. Gathering customer feedback was accomplished quarterly through e-mail surveys. For Ariba's customers, who generally had



multiple inquiries regarding the same product, this methodology was sufficient, as customers could accurately relay their experiences even several months after the trouble case was closed.

Ariba found, however, that as the company expanded its offerings, it received a higher degree of unique inquiries from a broader range of customers. This change in technical support dynamics accelerated the need for

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Satisfaction procured

*CSM program helps Unisys meet federal
government vendor guidelines*

By Victor Crain and James King

Editor's note: Victor Crain is vice president, technology division, ICR/International Communications Research, a Media, Pa., research firm. He can be reached at vcrain@mail.icr-survey.com or at 856-234-1695. James King is director of quality, Unisys U.S. Federal Government Group.

Unisys U.S. Federal Government Group has been serving the federal market for more than four decades. The Group is an information technology services and solutions provider to the federal government, selected U.S. public sector organizations and state Medicaid agencies.

Unisys' successful track record is based in part on understanding what it takes to serve the federal market, and careful attention to customer requirements. As a sign of how the company has done, in 1998 Unisys received six major customer awards including two Hammer Awards from Vice President Al Gore and an award from the Department of State for outstanding service. Unisys takes customer satisfaction very seriously.

Finite number

Satisfied customers are vital to any successful enterprise, especially when there are a finite number of customers, and each one accounts for millions of dollars in potential business. But imagine a situation in which these customers share information about how satisfied they are with their vendors, and where vendor ratings on select satisfaction measures are a mandated part of procurement decisions.

This is the environment facing companies serving federal agencies. Using information technology as an example, despite the size of the federal government, there are a relatively small number of decision-makers controlling several billion dollars in annual spending on technology services and products. In a highly formalized decision-making process, vendor satisfaction ratings can

account for up to half of the criteria for procurement decisions.

To be successful as a vendor to the federal government over time, you have to make sure your clients are highly satisfied with the products and services you provide. This is more difficult to do in the technology sector today. Contracts are fulfilled globally, and technology vendors now have less absolute control over what they provide. Technology has moved beyond the point where any one company can manufacture all products and services needed by a customer for a specific assignment. A critical element in servicing customers involves effective management of third-party subcontractors. Much of what affects customers may not be visible directly to vendor management.

One of the key tools in monitoring and managing performance is the customer satisfaction measurement program that the Unisys U.S. Federal Government Group has put in place. Obviously, when dealing with a small number of strategic customers, there is ample opportunity for vendor management to hear about problems or complaints. However, this ad hoc feedback may not provide a fair picture of the overall relationship with a customer. It certainly limits the opportunity for proactive problem identification and prevention. The systematic feedback generated by the survey provides a balanced view, as well as insights that can contribute both to the conduct of ongoing work and to the design of future proposals and project plans.

Federal procurement policies

Federal procurement is based on a competitive bidding process. The criteria used in selecting the bid are explicitly stated in the request for information (RFI) or request for proposal (RFP). The weighting assigned to each criteria is denoted by a number of points (e.g., out of a total of 100) assigned to the item.

In 1994, the federal government formalized customer satisfaction as a cri-

terion in procurement decisions with passage of the Federal Acquisitions Streamlining Act. The Office of Federal Procurement Policy issued a report on best practices for considering vendor past performance in procurement decisions in May 1995. In the federal government's view, "The use of past performance as an evaluation factor in the contract award process...enables agencies to better predict the quality of, and customer satisfaction with, future work. It also provides the contractors with a powerful incentive to strive for excellence." This logical view of vendors is not so very different from how consumers think about service providers.

The inclusion of past performance measures was a major break from a traditional, proposal-driven selection approach. "To select a high quality contractor, commercial firms rely on information about a contractor's past performance as a major part of the evaluation process. The government, on the other hand, for large contracts attempts to select a quality contractor by analyzing elaborate proposals describing how the work will be done and the management systems that will be used to ensure good performance. The current practice allows offerors that can write outstanding proposals, but may not perform accordingly, to continue to 'win' contracts when other competing offerors have significantly better performance records, and therefore, offer a higher probability of meeting the contract requirements."

The goal of procurement is to meet the contract requirements as cost effectively as possible, not merely reward excellence in writing.

Satisfaction assessment is based in part on prior experience with a vendor by the agency in question, and on the past experience of the vendor in serving other agencies with similar procurement requirements. Typical questions on which vendors are rated include:

- conformance to specifications and standards of good workmanship;

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Editor's note: Tom Logue is a project manager at Message Factors, Inc., a Memphis, Tenn., research firm. He can be reached at tlogue@messagefactors.com.

It's a CEO's dream: Every time the office doors open, customers by the thousands show up to greet arriving employees with wild cheers of support. Many are long-time customers while others have just discovered the company, but all proudly display its logo on everything from hats and key chains to t-shirts and bumper stickers. When the newest employee walks in, these avid patrons know not only his name, but his record of professional achievement too. "Hey, that's John Wilkinson from Tulsa," they say. "He's going to do great things for this organization!" Their enthusiasm can't be

contained. It spills all over town as customers tell everyone how the company is beating the competition senseless.

Welcome to the world of baseball, an industry that instills rabid loyalty in its customers. A loyalty that is passed from generation to generation, that makes friends out of strangers and enemies out of friends. However, for people in the sports business, it poses difficult questions. What should we do with this loyalty? How do we keep it, grow it and take advantage of it without compromising it?

These were the questions posed by the West Michigan Whitecaps, a minor league baseball team in Grand Rapids that asked Message Factors, a Memphis, Tenn., research firm, to help them determine how to effectively maintain fan loyalty on a limited bud-

get. They had gleaned a few ideas from fan complaints - like the possibility of undertaking a major construction project to ease parking-lot congestion - but otherwise lacked clear direction in their approach to fan loyalty.

Message Factors developed a study for the Whitecaps using its proprietary Value Analysis technique, which examines the relationship between overall perceived value and specific satisfaction attributes to determine loyalty drivers. Value Analysis goes beyond the numbers to tell a company "The Four Things Your Customers Want To Tell You." They are:

- The Basics - what customers expect of the company.
- Value Issue - what customers value about the company.
- Irritations - what customers don't

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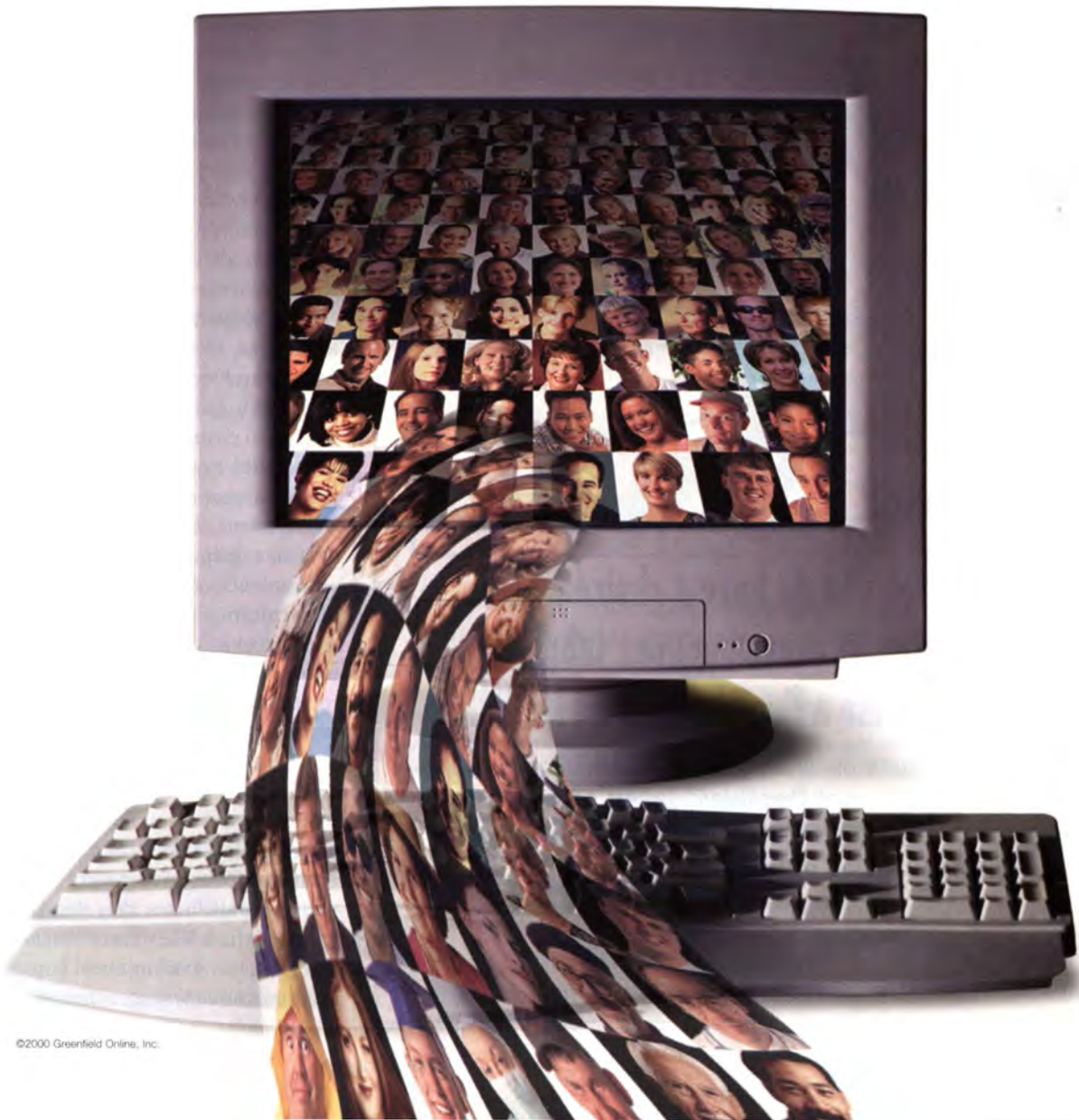
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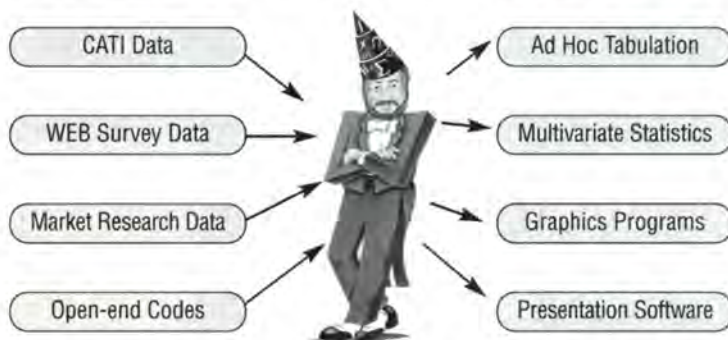
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Which to test?

The first and most crucial step in finding out what fans wanted to tell the Whitecaps was determining which issues to test. Through detailed one-on-one interviews with team staff and fans, and selections from our own database of industry-specific issues, we identified every point of contact between the Whitecaps and their fans. We designed a questionnaire that incorporated these 71 attributes, as well as general demographics and additional questions needed for our proprietary analysis, and distributed surveys to fans at a Whitecaps game. They were asked to rate the Whitecaps on each attribute, and were also asked to rate another familiar sporting event.

From the 1,010 questionnaires that were returned, we determined which attributes were Basics, Value Issues, and Irritations (there were no issues considered Unimportant in the study). The Basics included attributes such as stadium safety, restroom cleanliness, and variety of food items.

For the Whitecaps, meeting customers' basic expectations only guarantees that they will not be removed from consideration among available attractions. Exceeding basic expectations would yield no extra benefit, but underperforming in this area would cost them customers.

To build loyalty among their fans, the Whitecaps needed to focus on Value Issues. These included attributes such as helpful box office personnel, convenience of purchasing tickets and opportunities for autographs. These attributes had the highest contribution to overall value perception, and therefore also the highest contribution to loyalty.

When customer Irritations were identified, it was not surprising that many involved souvenirs, including price, quality, variety and shop hours. Although fans aren't very satisfied with these attributes, they don't expect to be satisfied. They know that anyone who goes to a sporting event hoping for quality souvenirs at a fair price is

bound to return home disappointed. In general, if innovation cannot redefine how customers think of an Irritation and add value to the concept, these attributes can be ignored without harming loyalty.

The next step was Theme Analysis, which examines the interrelationships among issues to identify overarching patterns and concepts. This step is usually the most helpful for our clients because it provides two unique benefits. First, it defines a clear message that can be communicated more directly - both inside the organization and when marketing externally - than a network of specific attributes. Second, it determines areas where performance increases on one attribute can lead to perceptions of progress on other attributes, increasing the impact of each dollar spent on improvements.

Key themes

For the Whitecaps, several key themes emerged. The most notable theme was personnel, which consisted almost entirely of Value Issues. Almost every point of contact with fans - including the box office staff, vendors, concessionaires, even the P.A. announcer - was a high contributor to value perception. Both the Whitecaps and their competition scored about average on personnel issues, giving the Whitecaps an opportunity to differentiate themselves from other competitive sports by becoming even more fan-friendly.

Finally, a segmentation analysis was performed on several groups, including heavy users (those who attended five games or more per season) and lawn seating patrons. Each of these segmentations gave insights into the unique loyalty drivers for each group. For example, heavy users value convenience of purchasing tickets more than the general population, while fans seated on the lawn were more concerned about clarity of the sound system.

Based on these findings, the Whitecaps were able to follow a specific course of action. Since they performed well on the Basics, they were able to shift their focus to improving and communicating Value Issues. The

Theme Analysis provided broad, easily-grasped concepts to target in internal planning and external marketing efforts. Value Analysis transformed fan loyalty from a vague, intangible phenomenon into a clearly defined cause-and-effect relationship.

In addition to gaining long-term strategic advantages, the Whitecaps also enjoyed an immediate and dramatic financial windfall. They learned that the post-game parking-lot congestion they were planning to

address was only an Irritation to fans. Yes, they were complaining, but the crowded exits weren't keeping anyone away from the games. Thus the Whitecaps not only avoided the headaches of a major construction project, but saved nearly a half-million dollars as well.

And what about the Whitecaps fan loyalty? The following season, the team raised its season ticket prices 25 percent - and got a 100-percent renewal! 🎉



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Discrete satisfaction-gap profiling

An alternative to top-box percentages and averages in customer satisfaction studies

Editor's note: Colleen Currier is marketing resources manager at BASF Corporation, Mount Olive, N.J. She can be reached at 973-426-2834. Arthur H. Schultz is director of advanced analysis at RSVP Research Services, Philadelphia. He can be reached at 215-969-8500.

In customer satisfaction research, a frequent practice is to compare the satisfaction levels that customers say they experience in doing business with the study sponsor against their experience with several different competitors. Comparisons are made for overall satisfaction, and for each of several product and service characteristics (product quality, customer service, timely delivery, etc.).

Typically the respondent-provided

ratings for each supplier are aggregated, using either an average or a top-box percentage. Then the aggregated values are compared. Below

study of the suppliers of an industrial commodity.

Based on the top-box analysis, competitor one was clearly the satis-

Supplier	Overall Satisfaction Top 3 Box % (8, 9, 10)
Competitor 1	77
Sponsor	56
Competitor 2	52
Competitor 3	31

are the top-three box (scale of 1 to 10) percentages for overall satisfaction that were computed in a recent

faction leader, and competitor three was clearly the worst performer. The study sponsor and competitor two



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were essentially tied for second place.

Limitations of top-box percentages and averages

Let's first describe just two of the limitations of top-box percentages and averages as measures of satisfaction, and then see how a simple alternative analysis can provide additional insights.

1. Top-box percentages and averages are aggregate values, and they lose the fine-grain detail that is available from each respondent.

Imagine that respondent 001 rated the study sponsor with a 10, and competitor one with a 6. Imagine further that respondent 002 did just the opposite, rated the study sponsor a 6 and competitor one a 10.

The actuality is that the study sponsor and competitor one each have one customer that regards them favorably, and one that does not. However, an average (for just these two respondents) would be 8 for the study sponsor and 8 for competitor one. Top-box percentages would both be 50 percent.

If we knew only the average or the top-box percentage, we would infer that the performance of the two suppliers is identical. We could not tell whether individual respondents gave similar ratings, or gave different and opposed ratings. For our example, the fact that the respondents hold different views is lost as a result of making the comparison after aggregating.

2. Top-box percentages and averages cannot deal simultaneously with the ratings of both "hard scorers" and the ratings of "easy scorers." (We call this effect "scale bias," that is, the tendency of some respondents to concentrate their answers in just one part of the provided scale.)

Imagine that respondent 001, a generous and easygoing soul, rated the study sponsor a 10, and competitor two an 8. The respondent prefers the study sponsor over competitor two, but both suppli-

ers would benefit equally in a top-box computation.

And imagine that respondent 002, a severe and demanding individual, rates the study sponsor a 7, and competitor two a 5. Again, the respondent has a clear preference for the sponsor, but both suppliers are penalized equally in a top-box computation.

Finally there is respondent 003, a middle-of-the-roader. She rates the sponsor 9 and competitor two a 7. Finally we have a respondent who does what we expect: puts one supplier in the top-three box range and one outside.

We have three respondents, each preferring the sponsor, and each giving the sponsor a two-point edge over competitor two. But top-box analysis only sees one of them.

What to do?

Discrete satisfaction-gap profiling

We have developed a simple procedure that does not aggregate the respondent data. This procedure just counts. It makes no use of either top-box ratings or averages. It can be used to supplement comparisons of top-box ratings and averages, or to replace them.

We call this procedure process Discrete Satisfaction-Gap Profiling:

- Discrete . . . because we do not aggregate the data before we make the comparisons between suppliers. Instead we look at each respondent's ratings individually, one at a time.

- Satisfaction-gap . . . because that is exactly what we are examining, the satisfaction gap between the study sponsor and the competitor.

- Profiling . . . because the end-result is a three-value profile that describes the relationship between the study sponsor and each competitor.

Discrete satisfaction-gap profiling has several benefits:

- It retains the full information content of the data set, and can thus provide insights not available from averages or top-box percentages.

- It avoids all "scale bias" effects.

• And, perhaps the biggest advantage of all, it is unequivocal.

Each respondent has weighed the two suppliers and made a choice. There is no need to explain the use of sophisticated statistical tools to the clients. Like a boxer or a basketball team, their company has a record: win, lose, draw. End of story.

These are the steps:

Supplier	Overall Satisfaction Top 3 Box (8, 9, 10)	Satisfaction Gaps (%) (Sponsor - Competitor)		
		Unfavorable (-2 or worse)	Tied (-1, 0, +1)	Favorable (+2 or better)
Competitor 1	77	30	58	13
Sponsor	56	--	--	--
Competitor 2	52	11	59	30
Competitor 3	31	15	48	39

1. For each respondent we compute a satisfaction-gap between the study sponsor and the competitor. The satisfaction gap is the difference between the satisfaction rating the respondent gave the study sponsor and the rating the respondent gave the competitor.

Our convention is always to subtract the ratings of the competitor from the study sponsor. Thus if respondent 001 gave a rating of 10 to the sponsor and 7 to competitor one, the satisfaction gap was 3. If respondent 002 gave a rating of 6 to the sponsor and 8 to competitor one, the satisfaction gap was -2.

2. Next, we classify each respondent's gap as being favorable (to the sponsor), a tie, or unfavorable.

To classify the gaps, we must first make a key assumption:

- Gaps of +2 or greater are favorable for the sponsor.
- Gaps of +1, 0, or -1 are ties.
- Gaps of -2 or worse are unfavorable for the sponsor.

This assumption is arbitrary, but we think sensible. Other classifications might be appropriate under other circumstances. If a scale other than 1 to 10 is used, some other scheme is necessary.

3. Then we compute the percentage of respondents that gave the sponsor a favorable satisfaction gap versus

competitor one, the percentage that gave a tie versus competitor one, and the percentage that gave an unfavorable gap versus competitor one.

We repeat this process for each competitor.

An application

We'll examine the results of applying discrete satisfaction-gap profiling

although these values are not used in the profiling. Since a gap is the difference between ratings of the sponsor and each competitor, the row in the table for "sponsor" is empty.)

The three rows in the satisfaction gap section of the table provide the profile for the sponsor versus each competitor.

Some things have not changed. The top-box analysis concluded that competitor one was ahead of the sponsor in providing overall satisfaction. Discrete satisfaction-gap profiling supports this finding. Versus competitor one, 30 percent of the respondents who directly compared the sponsor and competitor one preferred competitor one; only 13 percent preferred the sponsor. (And 58 percent saw little difference between them.)

Likewise, the top-box analysis concluded that competitor three trailed the sponsor, and the satisfaction gap profile supports this conclusion. Thirty-nine percent of the

to the suppliers of the industrial commodity mentioned earlier.

The end result is a table similar to the one shown. (We have included the overall satisfaction top-three box data shown earlier for comparison,

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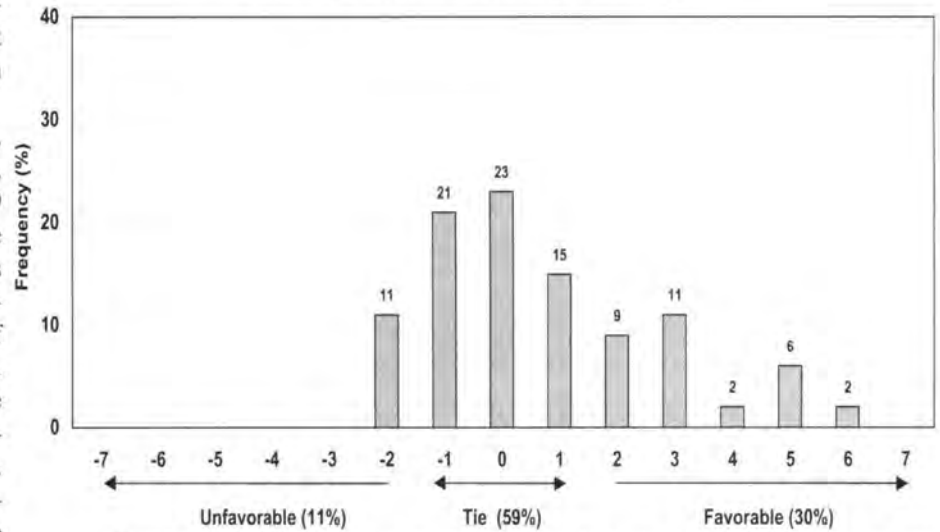
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respondents who directly compared the sponsor and competitor three preferred the sponsor; only 15 percent preferred competitor three. (And 48 percent saw little difference between them.)

But some information is new, and startling. For one thing, roughly half (48 percent to 59 percent) of the respondents see the sponsor and the competitors as tied in providing overall satisfaction (by our definition of ± 1 rating point equals a tie). This is true regardless of the competitor to which respondents compared the sponsor. The fact that for every competitor, half or more of the respondents were about as satisfied with the sponsor as with the competitor could not have been inferred from the top-box analysis. This finding has many critical implications for sales management and advertising.

Sponsor vs. Competitor 2
Satisfaction-Gap Profile
 Percent of Respondents Showing Specific Gaps



Further, the top-box overall satisfaction rating implied that the sponsor and competitor two are tied in the minds of the respondents (top-box ratings of 56 percent versus 52 percent). Yet the profile of the sponsor versus competitor two was quite

good; about three times as many respondents favor the sponsor as favor competitor two (30 percent favorable comparisons versus 11 percent unfavorable).

(The reason for the failure of the top-box comparison to detect this

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fact was because, for 57 percent of the direct comparisons of the sponsor and competitor two, the ratings for both the sponsor and competitor two were either both within the 8, 9, or 10 top-box range, or both outside it. Comparing top-box percentages detects a difference only when one rating is within the top-box range and one is outside it. For this set of data, using a top-box percentage comparison effectively ignored 57 percent of the comparisons the respondents provided.)

Using graphs

Although we did make our supplier comparisons before we combined any results, we nevertheless did then lose some detail when we combined gaps into just three categories - favorable, ties, and unfavorable.

We can turn up the magnification of our analytical microscope by looking at all the gaps. A table can present this data, but we have found that a chart is more quickly grasped by client management. The chart looks more closely at competitor two.

Here we learn more. The entire 11 percent of respondents who favored competitor two over the sponsor all did so by a difference of only two rating points (in the rating scale of 1 to 10). But the 30 percent who favored the sponsor mostly did so by a difference of three or more. Thus graphical analysis reinforces our conclusion that, although the top-box ratings for overall satisfaction indicate that the sponsor and competitor two are tied for overall satisfaction, the sponsor does in fact have a perceived advantage over competitor two in the minds of those respondents who rated both (but always remembering that 59 percent of those respondents saw little difference between the sponsor and competitor two).

Disadvantages of discrete satisfaction-gap profiling

Does discrete satisfaction-gap profiling have any drawbacks? We see two.

1. The first is that the work of

analysis increases. Simply comparing averages or top-box percentages and noting who comes in first is a quick and undemanding procedure. The computer provides a sorted list, and the analysis is finished.

Discrete satisfaction-gap profiling requires that a thoughtful analyst put some time into examining all of the three-value profiles, and that the analyst also in some cases looks at the underlying frequency distributions. Increased effort equals increased cost.

2. The second is that the data can get rather sparse. The study under discussion had 150 respondents from a survey candidate list of about 450, a typical mid-sized study for industrial work. (Many industrial studies have a survey candidate list of under 100, and total respondents numbering in the 20s or 30s.) To keep the phone interview to a reasonable length, each respondent was asked to rate only the sponsor and two other suppliers. As a result of this design, the number of direct comparisons available for discrete satisfaction-gap profiling was about 50 for each competitor. We think this level is adequate, but would be concerned should it be much lower.

In summary:

- Comparing averages and top-box percentages to learn which supplier has the satisfaction advantage can lose some of the information the respondents have provided.

- The cause of this loss is that averages and top-box percentages make the comparison after the data has been aggregated, losing the information on perceived satisfaction gaps that is available when we look at each respondent individually.

- Counting the perceived satisfaction gaps reported by each respondent keeps this information, and provides a deeper insight into the nature of satisfaction differences among competing suppliers.

- Discrete satisfaction-gap profiling provides a more unequivocal description of customer preferences among competitors than can averages or top-box percentages. (4)

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Satisfaction measurement:



Is it worth it?

By Tim Glowa and Sean Lawson

Editor's note: Tim Glowa and Sean Lawson are principals of North Country Research, a Calgary, Alberta, research firm. They can be reached at Tim.Glowa@ncResearch.com or Sean.Lawson@ncResearch.com.

There are many approaches used for satisfaction monitoring and just as many scales for measuring and reporting the results. Unfortunately, the measurement of

satisfaction is often considered to be an end goal, and the impact of achieving satisfaction ratings upon the bottom line is often completely ignored.

This article investigates common misconceptions about satisfaction measurement and the assumptions inherent in many satisfaction studies. Then, through a discussion of how satisfaction is typically measured, a new scale is introduced that provides increased descriptiveness

and strategic insight for satisfaction researchers. Finally, we suggest how satisfaction measurement results can be made actionable by linking satisfaction measures to customer behavior through predictive modeling techniques.

Obsession with satisfaction

Management is seemingly obsessed with satisfaction ratings. They refer to them in reports, encourage staff to help increase client sat-



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isfaction, tie bonus packages to satisfaction indexes, and they do a lot of surveys to find out how clients feel about their product/service.

Many companies sponsor recurring satisfaction studies that are compared against previous studies in an effort to benchmark corporate performance. This satisfaction obsession has led companies to think of satisfaction measurement as an indicator of performance - a proxy for profit or market-share numbers.

Although the relationship between satisfaction and corporate earnings has a visceral appeal, there is something overly simplistic about the assumption that a simple index of satisfaction has the import of a profit calculation.

The reason for this misconception lies in two common assumptions that most satisfaction measurement projects have in common:

1) that satisfaction and the bottom line are positively correlated; and,

2) that satisfaction metrics suggest a strategy for increasing satisfaction.

Let us consider these assumptions. If we invoke the fundamental economic assumption (and there is no reason not to in this context) of the "profit motive," then it is safe to say that management should be interested in increasing revenues and decreasing costs above all else. Further, management, employees, and consultants will all tell you that higher levels of client satisfaction are better for the company, but no one discusses the cost of achieving the higher ratings. The costs are not considered to be real, or more accurately they are always assumed to be economic - worth the expenditure. Certainly, it makes sense that, as customers are increasingly happy with a product, they may demand more of it, but certainly there is a limit. This is an example of decreasing returns to investment. However, it is rare that a satisfaction measurement study considers the costs of achieving an increased satisfaction ranking or what that increased level of satisfaction (or service) would be worth to the consumer.

Satisfaction studies need to consider what the end goal of management and the corporation is - in most cases, to increase profits (or, very often, market share) - and define the linkage between satisfaction and that goal.

The second assumption (that satisfaction measurement implies strategies for improvement) is best considered in the context of some examples. Look at the ways that satisfaction is usually measured. Some scales use biased wording (e.g., "not satisfied" to "very satisfied"); some try to gauge satisfaction based on expectations (e.g., "worse than expected" to "better than expected"); others use terminology open to interpretation (e.g., "not very important" to "very important"). In the end, there is nothing about the previous measurement scales that would imply a strategy for improving satisfaction any more than a bathroom scale pro-

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What good will it do to know that your company scored a "3 out of 5" or a "very good" when you have no idea how improve that rating or whether it is even worth improving?

Management needs more information and the burden to provide it falls naturally to the researcher.

How should satisfaction be measured?

Ideally, satisfaction should be measured in the same context in which it is supposed to exist or be provided. That is, just like you measure a person's weight by putting them on a scale rather than asking them outright. The satisfaction of a group should be measured by examining how differing levels of service affect the choices made by the group. Now, while putting people on a scale to measure their weight is within the realm of possibility, examining an infinite number of real-life situations in which the members of a group behave in response to varied service levels is definitely not. As much as we wish otherwise, market researchers do not have all the answers.

The key to successful and meaningful measurement is getting as close to this ideal as possible. There are two main components. First, the scale used to measure performance should provide succinct guidance on how to improve the measure. Second, there should be an understanding of the linkage between satisfaction and behavior.

What is your scale telling you?

The standard measurement tool is the Likert scale (or multiple choice scale). It allows the researcher to offer a variety of options to the respondent, but as suggested previously there are some problems with the interpretation of the scales. Joseph Duket explains that according to the standard dictionary definitions "poor" means "inferior and unsatisfactory," while "inferior" means "lower in quality, worth or adequacy;

mediocre." Finally, "mediocre" is defined as "of only average quality." Does this mean that a "poor" rating is average? Probably not. The point here is that the researcher and respondent can become swallowed up in a sea of semantic connotations that makes meaningful analysis very difficult.

Another approach, suggested by Steven Lewis, argues that the intermediate rating terms used to describe

satisfaction variables have different meanings in other countries, and proposes using a dichotomous adjective scale where only the definitive endpoints are defined (e.g., such as "totally satisfied" to "totally unsatisfied"). This is an improvement over traditional scales since a "totally satisfied" customer cannot be satisfied further. However, a problem arises if management tries to act upon measurements like these. Where do they

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start? Simply knowing a satisfaction rating provides little direction on how a performance or satisfaction attribute could be improved.

Likert (and the related, semantic differential scale) scales are efficient ways to collect data but they often need to be augmented by qualitative responses in the respondent's own words (written answers) to fully understand why the respondent gave the answer they did. What is needed is a hybrid between the efficiency of a multiple-choice style scale and the descriptiveness of written answers.

One alternative is to replace the standard increments of a Likert scale with carefully constructed propositions that provide the respondents with a clear articulation of their experiences. Compare the following scales from an airline satisfaction study: The first is a typical Likert scale; the second is a propositional-descriptive scale.

Scale A: Standard Satisfaction Scale How would you rate the performance of the in-flight crew today?

- (1) Poor
- (2) Fair
- (3) Good
- (4) Very Good
- (5) Excellent

Scale B: Propositional-Descriptive Scale

How would you rate the performance of the in-flight crew today?

- (1) anticipated your needs and made you feel that they were genuinely pleased to serve you;
- (2) were pleased to serve you and provided assistance when asked;
- (3) made you feel like they were just doing their jobs;
- (4) often neglected your needs even when asked.

Clients who have used propositional-descriptive scales feel they provide a cleaner measure of satisfaction and better strategic direction. Although the above scales were not tested in the field, similar tests of standard-Likert or semantic differential scales versus propositional-

descriptive scales suggest that respondents are less likely to cluster towards the middle or top of the scale, as often happens when respondents are reluctant to say something critical.

The use of propositional-descriptive scales gets us closer to understanding what strategies can be employed to increase satisfaction. If the results of the study show that airline travelers generally feel that the in-flight crew was "just doing their jobs" then that is something that can be communicated to management, who, in turn, can promote increased service levels or add more staff to an in-flight crew.

Using a propositional-descriptive scale may provide more information about satisfaction levels and how to improve them but there is more to the equation than that. What is the value of achieving higher satisfaction levels? Is it worth it?

How satisfied?

How satisfied do you want them to be? Management must answer this question. However, in order to answer it they will need to know what drives client satisfaction and how they can affect satisfaction ratings. Once the satisfaction level of a group is clearly understood in terms of its determinants then management can decide whether the efforts (and costs) required to increase satisfaction are worth it.

It should be noted that, regardless of the research methodology and tools employed, many researchers are bypassing an opportunity to increase the value of satisfaction research to the client. What good is it to know the determinants of satisfaction when the end goal is the bottom line? The vast majority of satisfaction measurement techniques fail to clearly demonstrate the linkage between changes in satisfaction perceptions and changes in market share. As such, they may be able to tell that overall satisfaction of a group will increase should the perceived satisfaction of a specific

attribute improve, but there is no linkage made to the bottom line. In some cases, researchers simply assume that increases in satisfaction result in a corresponding increase in market share. There is no necessary connection between satisfaction and market share that would support this blanket assumption.

If management is ultimately concerned with the bottom line, then increasing satisfaction in a group should increase the client's market share enough to justify the resources required to achieve the higher rating. If this is not the case then higher satisfaction ratings, for that client, have become counterproductive. The research into satisfaction must be tied to the costs of achieving higher satisfaction and whether there will be an offsetting increase in demand to justify the expenditure. Again, the approach to consider is the one that most closely resembles the decision environment of the respondents.

Discrete choice modeling and satisfaction measurement

The decision environment can best be approximated by asking the respondent to participate in a repeated set of hypothetical situations where they make decisions just as they would if they were faced with the situation in real life. The tool in this case is discrete choice modeling. (For a longer discussion on discrete choice modeling, please see the article by Steven Struhl mentioned in the section on further reading.)

Discrete choice models are derived by placing respondents in hypothetical situations where they are asked to choose between two or more competitors offering a product or service that is defined by a series of satisfaction attributes. Since respondents are stating a choice for which product they prefer, inclusive of various levels of defined service, the model is able to predict the impact on market share of not only any change in client-perceived satisfaction, but also for changes to satisfaction levels of competitors.

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Discrete choice modeling allows for the inclusion of price as a factor influencing choice. By including price, respondents are able to make trade-offs between service levels and price, thereby determining how much they are willing to pay for a given level of service. Ultimately, this information can be used to calculate the amount of a premium that could be charged for providing higher levels of service.

A problem with most satisfaction measurement methodologies is that satisfaction for an individual company or organization is measured in isolation from other competitors. This unrealistic environment creates false impressions about the importance of satisfaction since in the real world, consumers can and do switch between competitors when presented with unsatisfactory levels of service - they can even choose not to participate in the market at all. Discrete choice modeling enables the respondent to clearly indicate which levels

of service are sufficient enough to cause a behavioral change in purchasing characteristics.

As Bill Etter points out, the marriage between discrete choice modeling and satisfaction measurement is a perfect one. With discrete choice modeling, the data collection methodology closely resembles the actual decision-making process, in that respondents are able to evaluate all the attributes of a choice situation simultaneously rather than consider them individually. Thus, the respondents' choices in the hypothetical scenarios reflect their own perceived value of service or product attributes in a similar marketplace.

The researcher can combine key attributes (price, competitors, etc.) with satisfaction scales such as the propositional-descriptive scales to model their market and tie current satisfaction levels to current market share. More importantly, the researcher can also measure how changes in attribute levels, includ-

ing satisfaction levels, will impact market share, thus enabling the researcher to provide management with information regarding the potential revenues associated with changing satisfaction levels, and helping to answer the question of "Is it worth it?"

The end goal

If the end goal of satisfaction research is to positively affect the bottom line of the corporation then the corresponding research needs to reflect that goal. Satisfaction measurement should suggest how the rating can be improved and be able to tie the suggested strategies to cost data. Further, if management is to make informed decisions they must be aware of the revenue implications of any satisfaction initiatives. To do this, it is optimal to model the impacts of proposed changes on the decision behavior of the market. By comparing the cost and revenue side of a marketing strategy, it is possible to evaluate its effectiveness and worth. And that is the bottom line. **TM**

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Translate complaints into solutions

By David Glenn



Editor's note: David Glenn is president of Connected Inc., a Cos Cob, Conn., research firm. He can be reached at 203-661-0629 or at dglenn@Pipeline.com.

Many companies now provide toll-free telephone numbers on their packaging to encourage customer feedback to the consumer affairs (complaint) department. But what happens next? How do companies use this information, if at all? Are complaints problems, or just symptoms of problems? What is the connection between customer complaints and problems? It is predictable? Should companies spend money fixing problems based on

complaint data?

Companies make three main choices with regard to complaint data: 1) do nothing, 2) treat the complaints as problems, 3) figure out the connection between complaints and underlying problems. This brief article describes each.

The decision to do nothing merits little discussion. Some companies view customer feedback as an annoyance, whether it takes the form of complaints, surveys, or any other marketing research. At these companies, one may hear such statements as "We'll let the cash register tell us how we're doing." One problem with this approach is that cash registers are not very diagnostic when it comes to

telling which of the hundreds of things that could have gone wrong actually did go wrong.

The second approach is to treat a complaint as if the complaint itself is the problem. For example, I once worked for a large research company that provided syndicated sales data to marketing researchers. One year, the company decided to cut costs by not attending a major syndicated sales data conference. This started a rumor that my company was going out of business. When I told the president, he said the rumor was false and demanded the names of the few clients who had expressed the issue aloud. He said he would call them and "straighten them out." This pres-

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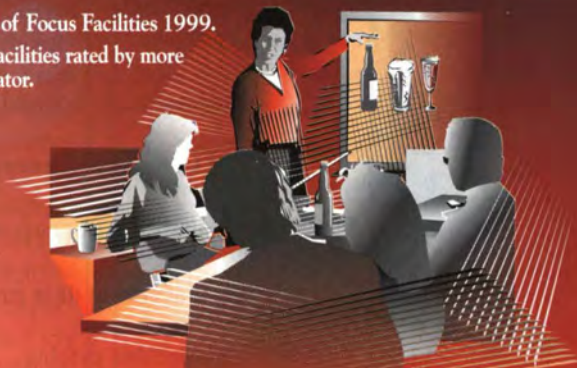
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ident was unable or unwilling to generalize beyond the people who were more vocal than the thousands of clients who did not speak out. Less than two years later, the company actually did go out of business, a victim of many such myopic decisions.

A less dramatic example of treating complaints as problems is the practice of sending apology letters to the complainers, along with a coupon to buy more of the offending product. The problem that triggered the complaint goes on, as do the consumers in search of an alternative brand.

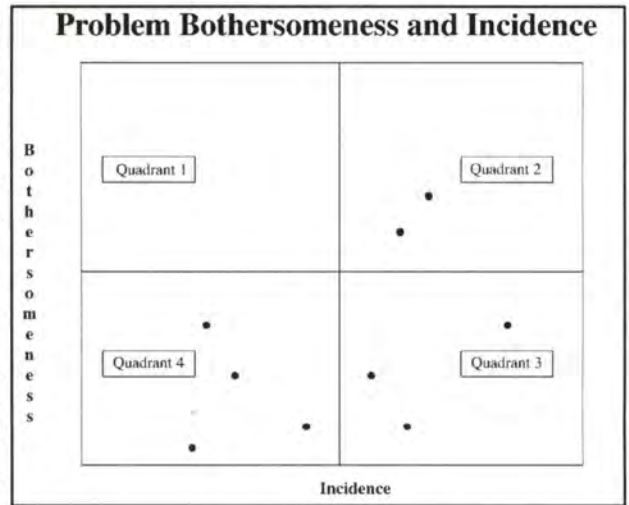
Why is it so hard to generalize beyond the complaint to a root source of dissatisfaction? First, the number of complaints is usually very low, and therefore hard for management to take seriously. It is not unusual for a brand with over \$100 million in sales to generate less than 10,000 complaints in a year. Only handfuls of customers will complain about any one issue. So if one believes that everybody with a problem complains, then the brand can well afford to withstand the com-

plaints! Consumer affairs departments are partly to blame for this complacency. In addition to their focus on complaints as opposed to all customers with problems, consumer affairs reports to management show mind-numbing detail, not calls to action. A recent report stated such facts as "foreign matter in product complaints remain constant at 23 per 10,000 packages sold."

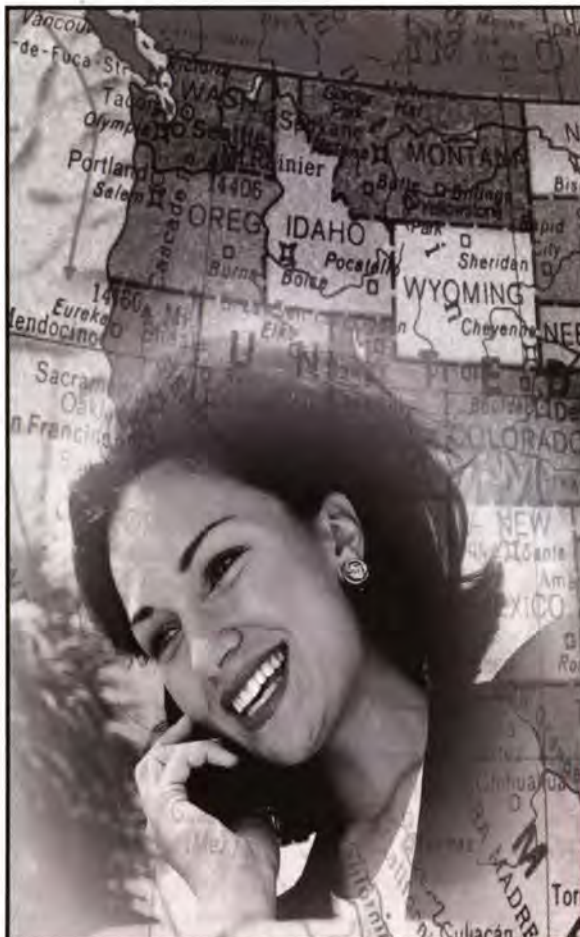
However, most dissatisfied customers do not complain. They either just silently put up with the problems or switch brands. This means that complaints are a market signal of some kind, and therefore worth understanding.

In recent years, more and more companies have reorganized their

consumer affairs departments so that they answer to marketing research managers. Senior management usually hopes that researchers will be able to connect all sources of consumer feedback, whether from toll-free num-



bers, product tests, tracking studies, or any other source. Senior management wants researchers to seek out convergence of information, and now this includes consumer affairs data.



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Therefore, the third approach is to make a connection between complaints and problems. This is easily solved using a problem detection methodology in which the researcher surveys a representative sample of past customers to see which problems, if any, occurred, and how bothersome they were to the customer. The problem list should be the same detailed list from the complaint data archives, so that a multiplier can be produced for each problem and each brand. For example, suppose 250 complaints registered for "package top difficult to open" for Brand A. If the problem detection study shows that 10 percent of the 20 million buying households had that problem, then the multiplier is 8,000 (2 million/250). Every complaint of this type for this brand represents 8,000 problems of this type.

It is easy to plot problem data in a way that motivates discussion and, hopefully, action. For example, Fig. 1 (at left) shows that problems in quadrant two, which irritate more people and annoy them more when they happen, deserve more action than problems in other quadrants.

Sometimes clients ask us if there are rules of thumb they can use for multipliers instead of conducting the research. We have two findings on this topic. We found that rules of thumb do not hold up to management scrutiny as well as real data from real research. Remember that the consumer affairs data are usually starting out without much credibility in the first place. It is worthwhile to quantify the issues accurately. Our second finding is that complaints and problems are subject to consumer expectations, and expectations vary by brand. Therefore, a rule of thumb for one brand does not translate well to another in a predictable way.

After making an explicit connection between complaints and problems, researchers can start reporting problems as well as economic consequences of them (using purchase intent data from the problem detection study), giving management the information they need to eliminate the problems and increase satisfaction. **74**



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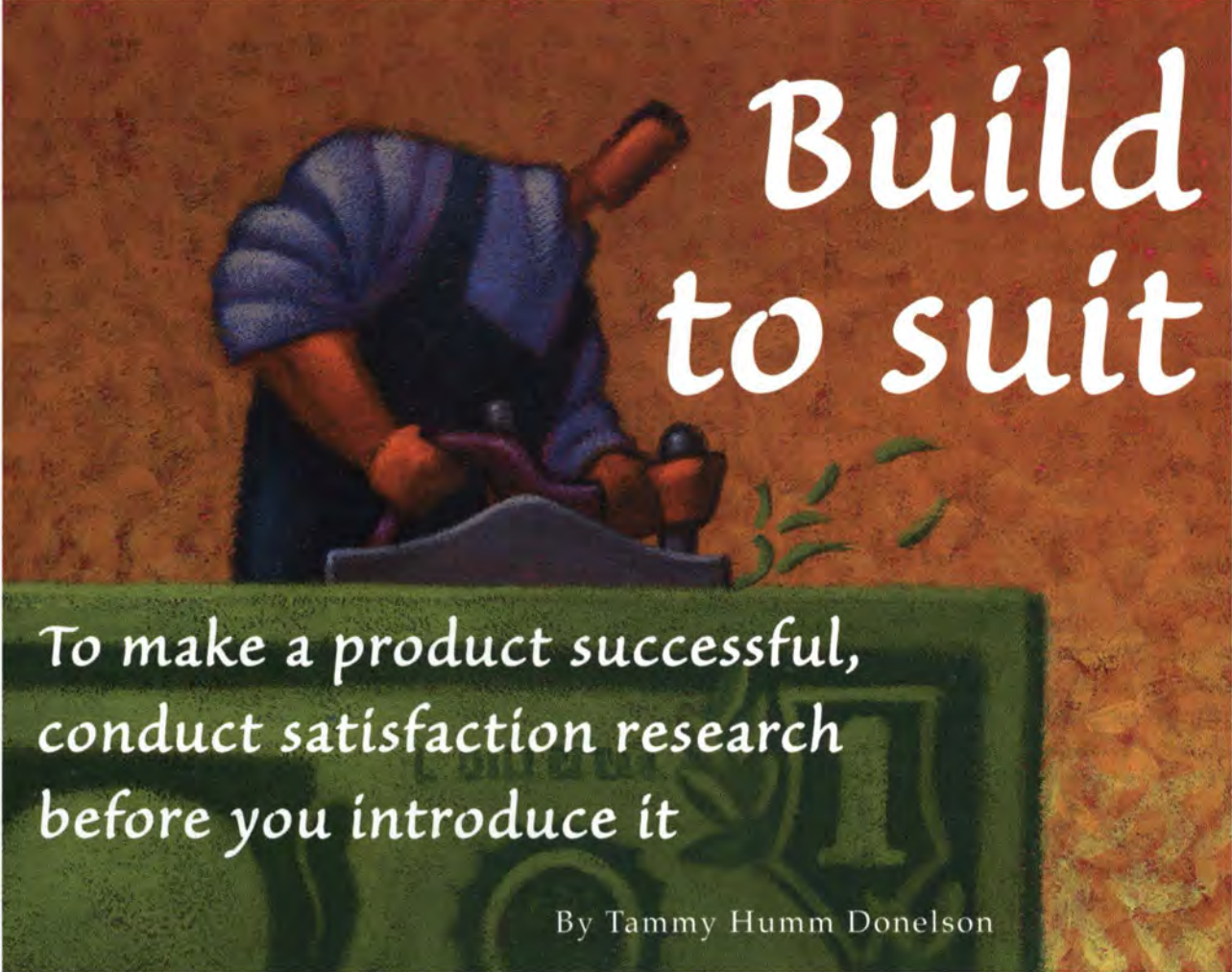
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Build to suit

To make a product successful,
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before you introduce it

By Tammy Humm Donelson

Editor's note: Tammy Humm Donelson works in marketing and public relations at Metaphase Design Group, St. Louis. She can be reached at 314-721-0700 ext. 124 or at tammy@metaphase.com.

Most companies concentrate their customer satisfaction research after the buying experience in a post-purchase analysis. Mystery shops, mail surveys, and one-on-one interviews with customers reveal perceptions of the product or service they have experienced. Mystery shops offer an inside look at the point of purchase. Surveys provide quantifiable data that can be very valuable when the right questions are asked. The same applies to one-on-one interviews. With the right questions and a bit of probing, customers may provide significant

insights into the quality of the product or service they received and the associated satisfaction. With the research data in hand, you can tell Mr. Big that customers are not happy; the product needs to be redesigned and the manufacturing equipment retooled. Not good. So what's missing?

Begin at the beginning

Customer satisfaction research that takes place before product development, even before product conception, can create products and services that thrive in the market. This pre-emptive customer satisfaction research allows the experience to be designed around customers' task and usage situations, thereby eliminating failures in the marketplace due to products that don't match customer needs and expectations. In this early phase of product

development, prior to manufacture, it is much easier to specify a product that satisfies customers. Customer satisfaction research conducted after the buying experience occurs when design changes are most difficult and most expensive.

At the front end, customer satisfaction research is accomplished through reality-based observation to gain an understanding of customer needs. This approach to customer satisfaction begins with an analysis of customer needs long before product conception. By placing an emphasis on research before product conception, product developers can incorporate the insights derived from the research into a new product.

At this early stage the research questions focus on usage environment, preferred product features and task analy-

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sis rather than the post-experience focus on attitude. A thorough, on-target understanding of customer needs in the pre-development phase leads the way to products that are targeted to their respective audience. Pre-development research may include traditional measuring sticks such as numeric ratings derived from phone and mail surveys and focus groups. This type of research quantifies the magnitude of preference. A deeper analysis requires observational research. Like a heat-sensing missile, observational research gets to the heart of the matter. Video observation, direct observation and surveillance techniques capture the habits and behaviors of customers in their natural environments. By recording the subconscious and unconscious actions of customers, observational research captures how customers actually interact with the product.

The changing view

In the changing marketplace, customer satisfaction is a moving target. Customer needs, perceptions, desires

and the associated levels of satisfaction are continually changing as the purchasing climate, technology and the customers themselves change. As the market constantly evolves, customer expectations change. They want a product to do more, do it faster and better. They want services that keep pace with technology. The changing market requires customer satisfaction research techniques that accommodate the shifts and speed facilitated by the new economy. In this environment, static quantitative research quickly loses its clarity. Part of the story is missing from the numeric data. How do customers really use this product? How do we need to change our services?

Observational research provides some of the missing information by capturing the small details unavailable through quantitative studies. These details are the key to customer satisfaction because they can create the subtle differences between your product and the competitors'. Let's face it: all the players will get the big issues right or be out of business in a hurry. The

superior product comes from knowing the exact environment and circumstances in which the customer uses the product and how the customer is likely to interact with the product. Observational research gleans important information from what customers aren't saying as well as what they are saying to provide a more complete understanding of customer perception, response and behavior.

Understand what they aren't saying

Your impression of someone on the phone often changes somewhat when you meet him. Similarly, direct observation supplies the subtle nuances that promote a more complete understanding. Direct observation eliminates the blind leaps from straight quantitative research to product development. Direct observation brings in the reality. Manufacturers may think they know how their product is used. But where is it stored? Who is actually using it? Is the same person buying it?

Effective customer satisfaction research begins in customer's homes, cars, and other fields of use. Here researchers can observe customers in their natural surroundings and minimize the resistance that occurs in an artificial environment. Customers respond unconsciously. Video or self-portrait action shots of customers using products capture the reality that can be missed through interviews and surveys. Video research and direct observation help capture the unconscious actions and habits that people aren't aware of. ("Oh, did I do that? I didn't realize it.") The unconscious behavior may manifest itself as individuals naturally seek their comfort zone. Studies show that humans and animals consistently seek the most ergonomic conditions for themselves. More than just proper physical fit, proper ergonomics embraces cognitive and behavioral fit. Placing customer satisfaction at the front of the development process allows proper ergonomics and intuitiveness to be designed into the product.

A case in point

A client hired Metaphase Design Group for a facelift on an existing home health care device whose sales

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were drooping. The client wanted to know which design had the most appeal. Research participants evaluated the existing product and the new prototype. The choice of the research participants was clear: They liked the new styling.

On the surface, the client had the information it wanted. But further observation research and deeper questioning revealed that styling wasn't important. The customers' main concern was the mechanical operation of the product not the aesthetics. A product that simply had stronger visual appeal did not pacify them. The new design would not persuade them to buy the device. They wanted a product that worked better. Since the facelift would be a significant investment with little anticipated return, the research team recommended that the client delay creating a new package exterior until the client had the resources to redesign and retool the operation of the device.

Without an understanding of the issues most critical to customers the client could have spent hundreds of thousands of dollars and valuable time developing a new package that didn't address the customer's true needs. The client went back to the drawing board to ensure that customers would be fully satisfied with the new device when it reached production.

Commit to listening

This client avoided the trap of succumbing to the pressures of internal timeframes. They sought the objectivity of an outside research firm. They listened to the research, believed what the video clips revealed and refused to rush to market with a product destined to fail. The objectivity of an outside team is important in delivering impartial untainted data. The manufacturers have the very real pressures of getting product into the market, but it may obscure their vision of reality. Even when they do hire an outside firm, they have to commit to listening to the data, accepting the results and being prepared to change their thinking. If your company can't commit to listening and changing, don't waste your time and money on any form of customer satisfaction research. 

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Customer satisfaction research:

a matter of choice

By Gene Leichter

Editor's note: Gene Leichter, president of Leichter Research for 13 years, has joined with New York research firm Eric Marder Associates to extol the benefits of choice research. He can be reached at 212-986-2130 or at research@usa.com.

Over the last two decades, companies across corporate America have learned that they must listen to their customers to keep product offerings current, competitive, and on-target. Maintaining customer satisfaction is an essential element of building brands and building customer loyalty. Monitoring satisfaction with all aspects of the business enables marketers to anticipate and respond to perceived problems before they can cause damage.

Customer satisfaction research has become so widely used and specialized that many companies consider it an entirely separate discipline from marketing research. It has grown and matured over the years, as illustrated by the many ways companies use the results of satisfaction research. Satisfaction research data provide:

- a single "point in time" report card to businesses;
- a benchmark to track the success of product and service delivery;
- a measure of management performance against goals;
- an objective measure on which to base compensation;
- an internal measure to evaluate performance of divisions, regions or other business units;
- attributes to track satisfaction, not just a single score;
- attribute ratings as a diagnostic tool for improvements.

The methods of data collection, analysis and reporting have also matured. Many years ago I worked on a customer satisfaction program that provided business reply cards to fast-food customers at the point of purchase. Data was often unavailable for several months. In another instance, I designed a program in which customers were interviewed by telephone to gather their opinions on a



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In early customer satisfaction studies management was primarily interested in answering the perennial question "How am I doing?" As studies became more sophisticated and the interviews became longer, questioning covered more aspects of the customer's experience. How this new data is used represents the next stage in the evolution of customer satisfaction research.

Considering the great expenditure of money and effort put into customer satisfaction research, you would expect there would be detailed analyses and actionable recommendations resulting in a direct impact on revenues. This is rarely the case.

Savvy marketers are beginning to realize you can get more from your customer satisfaction research budget. By using a choice research model, you can obtain all of the key customer satisfaction data you did before. In addition, you can generate accurate category share data and be able to conduct an unlimited variety of simulations and assess the impact of alternative strategies on repurchase rate – the "ultimate" measure of customer satisfaction.

Eric Marder Associates (EMA) has sought to understand and predict

behavior. Through this process, EMA has developed a theory of choice behavior and proprietary techniques for gathering and analyzing data to predict how people will behave.

In his book *The Laws of Choice, Predicting Customer Behavior* Eric Marder summarizes his opinions about customer satisfaction research in his "Customer Satisfaction Principle." He states: "Customer satisfaction is nothing but a brand's deserved share among its own customers."

EMA's approach to measuring choice flows directly from the theory of how people make choices. Whether people are choosing a brand of facial tissue, or deciding which car to buy, the elements of the choice process remain the same.

- People have specific needs.
- People have unique perceptions about the choices available to meet those needs.

If we look at the intersection of each person's needs and their subjective evaluation of the choices available to them, we can determine the value of each choice to that person. Through simulations, we can also determine the extent to which each choice would change if a new strategy were implemented.

These are the underlying principles of the SUMM (Single Unit Marketing Model) technique. This technique uses choice research to estimate deserved market share, which is what customer satisfaction is all about. This single research tool can provide a multitude of data:

- traditional customer satisfaction

metrics;

- accurate estimates of share for your brand and for your category;
- a tool for modeling and simulations.

SUMM predicts choice by integrating what people want (their desires) with what people believe. Data are not averaged; instead, all analysis is done at the single unit or respondent level.

The model differs from others in its reliance on respondents' beliefs. The premise is that what people actually believe is more important than objective characteristics. For example, if a respondent believes your product has a great warranty, this belief influences their choice. The objective "fact" that your warranty is no better than the competition's, is, for that respondent, largely irrelevant.

The SUMM technique has replaced traditional numerical and semantic scales with an open-ended behavioral scale to reduce order effect and increase sensitivity. It uses the unbounded write-in scale to collect ratings that represent desirability. This proprietary scale has several distinct advantages. Unlike bounded scales (1 to 10, very important to not important), the unbounded write-in scale permits full freedom of expression.

If a respondent likes one attribute a certain amount and then comes across something he likes even more, the unbounded scale does not limit him. Bounded scales cannot distinguish between a respondent's most important choice element and others. The unbounded write-in scale can and

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does determine ranked importance for every respondent.


Bounded scales are subject to "bunching." Typically, many respondents bunch at the poles or ends of the scale. For example using a +5 to -5 scale, 76 percent of people rated a food product a +5, implying that they liked this product so much that its desirability could not be increased further - an unrealistic conclusion. The unbounded write-in scale is more likely to generate a distribution of the desirability of a product or characteristic resembling a normal curve.

The model examines the desires and beliefs of each respondent and generates chooser shares, which closely parallel actual shares.

Simulations are the most valuable product of a SUMM study. Simulations, or games, allow the evaluation of countless strategies. In each game you are essentially asking, "If our advertising increases the perception that our product can do this, or our competitor initiates this new offer, or we make physical changes to our product, or all of the above occur, how will this impact people's choices about our product?" In each case, the output provides unambiguous information about the impact of those changes on the choices people will make.

This simulation model is an enduring tool. Simulations can continue to be run for years, or for as long as the basic beliefs and value structure remain valid.

A client and dedicated user of choice research recently described how his company has integrated this modeling methodology into its customer satisfaction tracking process. "Instead of traditional satisfaction measures, we focus our attention on the 'chooser share' among customers. SUMM has been a powerful ally in maintaining and improving our marketing competitiveness. It lets us 'simulate mistakes and introduce winners!'"

Traditional customer satisfaction research alone, or with the added benefits of a choice research modeling methodology. The choice is yours. 

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Data Use

continued from p. 16

If you knew the correct shape beforehand, you wouldn't have much need for Doc Sigma. Doc didn't know the correct shape either, so in a busy moment he did the convenient thing and presumed that it was a straight line. The equation for a straight line has the look of science but, in this instance at least, none of its substance. Straight lines often capture

marvelous physical laws in science and engineering but there is no reason to be assuming them in commercial applications. An algebraic formula does have the virtue of simplicity and economy, but who needs an economical description of a poor model?

Surely the combined powers of mathematics and the Pentium chip wrested what was wanted from the data? Nope. What Doc did happens all too often because it is tempting to make casual use of a ubiquitous tool

called linear regression.

Linear regression

The formula that Doc gave you multiplies age by 971.4 and adds 1536.2 to the result. He got the 971.4 and 1536.2 from linear regression software, which carried out the onerous computation needed to find these numbers. These numbers define a specific line that fits the data.

Linear regression is a mathematical method of estimating some quantity (such as a dollar amount) by "weighting" one or more predictor measurements, such as age, number of children, bowling average, and so on. It was developed long before the digital computer and its eternal reign is assured because of its appeal as an academic subject.

If the only modeling tool that Doc had on the shelf was a linear regression package we can see how his expedient model came about. Such packages assume that straight lines are the correct shapes relating each of the predictors to the quantity to be estimated. Suppose that, in addition to age, your data contained "number of children" as a predictor of income. Putting both predictors into the regression package would hatch a formula like:

$\text{Income} = 1007.8 * \text{Age} - 752.35 * \text{Number of Children} + 933.6$

The asterisk is a multiplication symbol. The impact of our newcomer, number of children, is also linear. That's so because, totally independent of age, the estimated income drops, in straight line fashion, \$752.35 with each additional child. We'll use this formula relating age and number of children to income to illustrate what it is most important to know about the numbers that regression provides:

1) It is common, but misleading at best, to think of 1007.8 as a "weight" for age and -752.35 as a "weight" for number of children. If age had been expressed in months rather than in years, the new "weight" would be smaller by a factor of 12, simply to reflect the change of scale. The mag-



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nitude of the “weight” is therefore not a measure of the importance of the predictor that it is applied to. Call these multipliers “coefficients” instead, and you’ll be absolutely correct and avoid the semantic danger of “weight.” There will be as many coefficients as there are predictors in the model.

The only purpose of the coefficients and, indeed, all numbers (technically, parameter values) produced by regression, is to make the formula fit the past data well.

2) Note that the coefficient (-752.35), the multiplier for number of children, is negative. This must not be interpreted to mean that as the number of children goes up the estimated income must necessarily go down in the real world. The sign of the coefficient will only have a trustworthy directional meaning when there is just one predictor. If there are two or more predictors and they are correlated, one predictor can end up with a positive coefficient and the other with a negative coefficient to confound common sense. For our data, in fact, if number of children had been the sole predictor it would have gotten a positive coefficient! Combining number of children with age, with which it had some correlation, gave rise to the misleading negative coefficient.

3) The last regression parameter, the constant +933.6, exists to ensure that if each predictor takes on its average value, the resulting income estimate will also be the average. Linear regression always works that way. Given an average age of 45.67 and an average number of children of 1.41, we can plug these values into the regression equation as follows:

$$1007.8 * 45.67 - 752.35 * 1.41 + 933.56 = 45899$$

and 45899 is indeed the average income in the data. After the coefficients are multiplied by their predictors and summed, there will always be that constant (even if is zero) to add at the end.

Mathematical heroics

Thus far we’ve talked about linear regression’s assumptions of linear relationships and how to interpret the

parameter values that it comes up with. But what if the relationship isn’t linear? You can toss the data into linear regression uncritically anyway, but what you will get is a linear approximation to the correct shape. The more the correct shape departs from flatness, the more accuracy you will lose.

Because the linear regression procedure is chiseled in classical granite, the burden of bending the data into something resembling a straight line falls upon the conscientious user. The technical word for bending is “transforming.” Because of his propensities, Doc Sigma would probably try something mathematical to do the transforming. For example, if age and income don’t have a straight-line relationship, perhaps the square root of age has a straight-line relationship with income. There is nothing magi-

cal about a square root. It is one of many mathematical functions that might be tried in an attempt to trans-

Linear regression is a mathematical method of estimating some quantity (such as a dollar amount) by “weighting” one or more predictor measurements, such as age, number of children, bowling average, and so on.



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form age into something new that will work better with linear regression. A transformation here and there might be fun and challenging, but what if you have a hundred or more candidate predictors to deal with?

A 1995 book written for the direct marketing industry has this to say on the subject of transformations [our comments are in square brackets]:

"...it is also fairly easy to look at a scatter plot [a plot of individual data points, with the predictor plotted hor-

izontally versus the variable being predicted vertically] of the relationship and determine if the relationship is linear or if the relationship needs to be straightened by the use of some transformation."

The above statement is true if there are a small number of cases and the relationship is so strong as to be obvious to the eye. If there is a weak relationship buried in 50,000 cases, Sherlock Holmes, armed with his magnifying glass, couldn't find

it. A similar tack, with the same difficulty, is to plot the errors ("residuals") of a linear model to look for obvious patterns of missed information. Recently we were shown a very slow (but dogged) computer program that tries one transforming equation after another, dutifully plotting each formula that it finds on the monitor. You literally could let this thing run all night. Such fanatical devotion to analytical functions is hard to justify because the end user, the one paying the bills, undoubtedly has no intuitive interpretation of any of them.

Let's return to the original problem of predicting income using age. To illustrate our point, suppose that the following heroic model provides a better fit to your data:

$$\text{Income} = 46001 - \exp(0.01355 * (\text{Age} - 46))^{**2}$$

Not a good bet to give your boss warm and fuzzy feelings. There is absolutely no meaning to the above equation other than that it is a smooth curve that happens to fit the data better than a straight line. Even more exotic equations can always be found to fit the data ever tighter. These curve-fitting exercises are not only devoid of meaning, they can overfit and engender a false confidence that something scientific is being accomplished. Complexity often masquerades as sophistication, form as substance.

Mundane heroics

Let's begin with what a model is and what it isn't. A model is just a set of rules to take you from what you already know to an estimate of what you want to know. Getting back to our original hypothetical problem, you want to go from what you know (age) in order to estimate what you want to know (income). There will be some error, of course, but you would like to be right on average, being neither consistently high nor consistently low with your income estimates for any particular age range. Any set of rules that accurately describes the relationship between age and income is a valid model.

You would be better off by constructing your own tabular model

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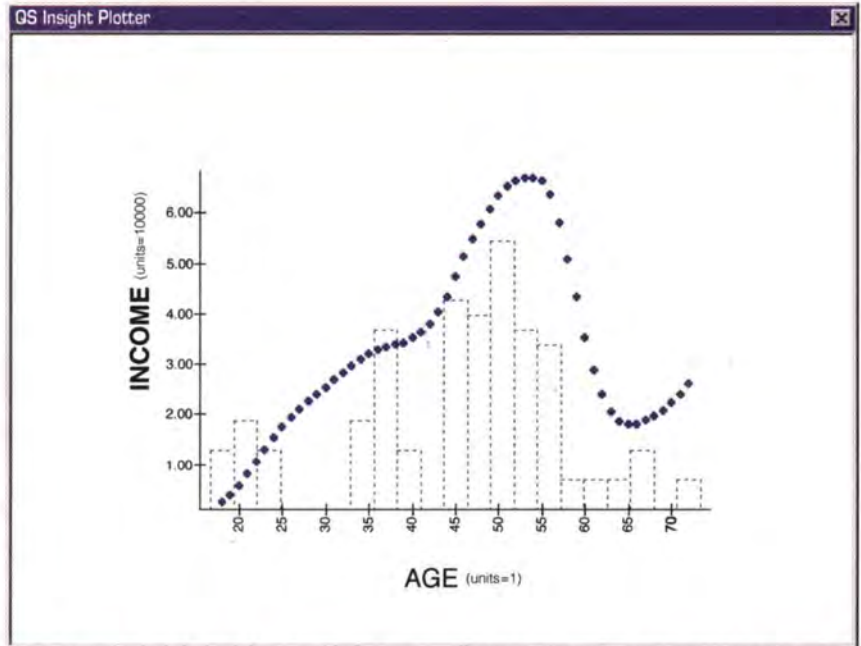
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56-60\$30,000
61-up\$21,000

At least this table reflects the reality that students and retirees make less, on average. It may not be algebraic or optimal but it is a model, and a nice nonlinear one, at that. Here is the essential difference between Doc's linear model and your pragmatic table. Doc's equation is "global," meaning that it will deterministically come up with an estimate of income for any age, from zero to infinity. If, through a data entry or programming error, the value of age plugged into the formula were 999, it would cheerfully estimate Income to be \$971,965. Be aware that many mathematical expressions will project into the wild blue yonder without regret if they are given predictor values ridiculously far outside the legitimate range. It is not always easy to find mathematical expressions that bend with the data in all the right places within the legitimate range!

There is a more practical approach to this transforming business. It is suggested by the way we tabulated that the income for the 56-60 age range was about four times that of the 18-22 range - more or less by grouping contiguous age ranges and noting how the average income changed. The computer procedure for doing this is called local smoothing. In local smoothing it is assumed that in estimating, say, the income for age 35, ages 34 and 36 will have very similar incomes to those aged 35 and therefore get almost as big a weight in the averaging. The incomes for age 18 or age 70 would have no relevance to the 35-year-olds and get a weight of zero in the averaging. It is more sensible to use the computer to find this local information directly than to hunt for a shape (mathematical function) that will undulate fortu-



itously in just the right places. The figure illustrates the result of a local smooth.

Categorical predictors

Linear regression assumes that the predictors measure something. Suppose that we have as a predictor

marital status, and it is coded 1 = married, 2 = single, 3 = divorced, 4 = widow(er). These four numerical codes don't measure anything; they are arbitrarily assigned to label the categories. The user of linear regression has to tap dance around this problem by the creation of addition-

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al predictors called dummy variables. We won't get into all of that, but advise you to note that it is another awkward aspect of trying to accommodate to the assumptions of linear regression. We don't envy anyone who has to deal with dozens of candidate predictors that require the transformation trick or the dummy variable trick.

Is the model significant?

In evaluating how good a model is, the only thing that counts is how well it predicts on data that it hasn't seen before. Always hold out some data from the modeling process for that purpose. When the scores for the outside data are sorted from lowest to highest, do the lowest and highest scores obviously separate the opportunities from the risks? Comparing the discrimination of the lowest 10 percent of the scores versus the highest 10 percent of the scores is a common measure of goodness. There is nothing special about grouping the scores by deciles. A good rule of thumb is to make the groupings as small as possible while the pattern of gradual discrimination from group to group is preserved. If the gradation is obviously present and the result on out-of-sample data looks good enough for you to use, it is significant, period.

The ordinary semantic meaning of the word "significant" is "meaningful" or "important." The statistical meaning of the word is a judgment that a departure from a hypothesis is too large to be reasonably attributed to chance. "Significant" in the statistical sense has nothing whatsoever to do with whether a result is good. It only has to do with the odds that the result isn't random. Keep it simple: If it looks good enough for you to use, it surely is statistically significant and you will be spared expert advice of the following kind (from the previously-cited book):

"The ratio of model sum of squares divided by its degrees of freedom to error sum of squares divided by its degrees of freedom is the F statistic. If the p value is less than 5 percent,

then the model is considered statistically significant with 95 percent confidence."

Guarding the temple


If you look at linear regression as mathematics, it is beautiful. If you look at it as a tool for modeling and scoring it has many blemishes. To approach the mathematical temple you need a priesthood that knows how to manipulate the data to conform to the linear canon, talk about F tests, and issue these kinds of warnings (same book again):

"...we should keep in mind the fact that a final regression model may have to be applied to a customer file of millions of names, and the more complicated the model, the more difficult it may be for programmers, who are not statisticians, and who may not have the programming tools required to deal with logs, to score the database."

This is an incredible statement. After all the folderol to get the model, the poor programmer may not have

the wherewithal to use it!

Conclusion

There is much more to the subject of linear regression. We've offered the most practical tips because regression is everywhere and has so much tradition behind it that it will be around for a long time. Linear regression is a legacy of the pre-computer days and requires experts to service it properly. This is backwards and expensive. Software should serve people. If you really know what you want, you can render it in software. Modern, computer-oriented methods can take care of those linear regression strictures that now require a high-priced attendant, including the screening out of extreme values, performing transformations, and dealing with categoricals. When it comes time to predict, there is no reason why it cannot be done automatically and embody the ability to handle data that fall outside the range of the data used to build the model. 



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Product & Service Update

continued from p. 12

SPSS has also released SPSS Data Entry 2.0, which includes everything needed to build custom online or paper survey forms, enter data and check for accuracy through the use of rules. Its drag and drop graphical interface is designed to simplify the survey-building process and makes defining variables and questions easier. Once created, questionnaires can be completed onscreen, online in a browser (in conjunction with SPSS Data Entry Enterprise Server) or printed out and filled in by hand. Data entered into the forms, labels and dictionary are immediately ready for analysis using SPSS Base, SPSS' flagship data analysis software. For more information visit www.spss.com.

New books from New Strategist

New Strategist, Ithaca, N.Y., has

published three new books. *American Attitudes: Who Thinks What about the Issues That Shape Our Lives* examines changes in the opinions of Americans in 1998, 1988 and 1978 and analyzes the social and demographic trends behind these changes. The book uses data from the General Social Survey of the University of Chicago's National Opinion Research Center and contains chapters on topics such as the arts, health and medicine, and women's roles. The nine chapters of *American Men and Women: Demographics of the Sexes* cover attitudes and behavior, education, health, income, labor force, living arrangements, population, spending, and wealth. *Racial and Ethnic Diversity: Asians, Blacks, Hispanics, Native Americans, and Whites* profiles the important characteristics of these ethnic groups using data on categories such as spending, education, life expectancy and housing. For more information call 800-848-0842 or visit

www.newstrategist.com.

Survey System updated

Creative Research Systems (CRS), Petaluma, Calif., is offering The Survey System Release 7.0 Internet Module for creating Web-based questionnaires and reporting the results online. The Survey System's Web page surveys include capabilities such as skipping questions or limiting respondents' answer choices based on their answers to previous questions, randomizing question- or answer choice-order, showing previous answers in the text of questions and more. A researcher can either post a questionnaire on their own Web site or upload it to servers hosted by CRS. The Survey System also offers options for changing the appearance of Web page questionnaires. Tables can also be custom-configured using a range of content, formatting, color and font choices. In addition, the program allows the Webmaster to control access to sensitive data by assigning either standard or individual passwords on a need-to-know basis. Both tabular and verbatim reports can be displayed on the site using similar password access. Release 7.0's Internet Module incorporates an existing E-mail Module, which allows users to gather survey information through standard e-mail channels. The program automatically screens out duplicate entries and incorrect multiple answers and captures valid replies in a Survey System data file. For more information call 707-765-1001 or visit www.surveysystem.com.

Online physician panel

New York research firm Ziment Inc. has launched the first of a series of online professional communities designed to facilitate marketing research through the Internet. Through WebSurveyMD.com, a dedicated panel of physicians in the U.S., Ziment will provide both qualitative and quantitative research to several charter clients who will retain exclusive use of the physician panel. The physicians who

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join the panel have access to survey results, opportunities to have a dialogue with colleagues, and medical news and information. They are paid an honorarium for their time according to standard marketing research practice. The site contains neither co-branding with commercial physician Web portals nor advertising. The physician panel has been recruited from randomly selected physicians contacted via Ziment's telephone center, via links from other Web sites and through direct mail, fax and conference recruitment. Panel members' qualifications are verified in two steps. First, the name of any physician who opts to join is verified through American Medical Association lists. A form is then faxed to the new member for signature. WebSurveyMD.com will also provide a new tool for tracking physician perceptions of medical Web sites. WebSurveyIQ is based on physician surveys conducted through the panel and includes evaluative scales for individual dimensions such as quality and accuracy and ease of use as well as an overall evaluation. A limited, initial series of ratings was based on an online physician survey in May 2000. For more information call 212-647-7200 or visit www.ziment.com.

New version of Remark Office OMR

Principia Products, Inc., a Paoli, Pa., research software firm, has launched version 5 of its data collection product, Remark Office OMR. Remark Office OMR is a Windows software package that allows a user to scan plain-paper forms using a PC-compatible image scanner. Remark is an alternative to traditional OMR (optical mark recognition) systems, manual data entry, and data entry service bureaus. Rather than purchasing pre-printed OMR forms, users can create, print and copy their own scannable survey or test forms. The forms can then be scanned using a commonly available desktop scanner. The software can grade tests and tabulate survey results, provide data analysis and graphs, or produce data that is compatible with any database,

statistical or spreadsheet package. Enhancements and features in the new version include improved and expanded statistical analysis with Remark Stat Pro. The software interface has been updated and an "easy" mode allows users to perform one-step scanning, processing and analysis. Users will also find that the new version is easier to customize for their unique forms. Version 5 includes enhanced image handling, automatic detection and display of handwriting in an open-ended

question, a new comment report, updated file formats for Access 2000 and Survey Pro and improved ODBC support. For more information call 800-858-0860 or visit www.PrincipiaProducts.com.

SYSTAT 10 from SPSS Science

Chicago-based SPSS Science has released SYSTAT 10. The latest version of the scientific software now

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includes GraphExpress, new technology that enables users to create any SYSTAT graph from within SAS software for Windows with the click of a button. SYSTAT 10 also includes new statistics capabilities, including mixed regression and power analysis, as well as a range of user interface enhancements.

GraphExpress provides a straightforward way to create any SYSTAT graph from the SAS software for Windows environment. Users choose from more than 20 general graphics toolbar buttons that call up dialog boxes of plot options to create customized graphs. GraphExpress also creates immediate diagnostic plots for common analytical procedures such as GLM, correspondence analysis, factor analysis, and discriminant analysis. In addition, users can select an image from the Graph Gallery to quickly plot their data from existing graph templates. For more information visit www.spssscience.com.

Reach energy decision-makers online

Applied Marketing Science, Inc., a Waltham, Mass., research and consulting firm, has launched Panalyst.com, an Internet panel of business energy decision-makers. These individuals are pre-screened, pre-recruited and available to give utilities, energy suppliers, and energy service companies quick answers to research questions. A panel is already in place in Pennsylvania, the state with the most active deregulated energy market. Other states will be added on a rolling basis, including Connecticut, Illinois and Maryland in 2000, and Texas, Ohio, California, Massachusetts, and New Jersey in 2001. For more information call Eileen Moran at 781-684-1230, x127.

Scantron updates eListen

Scantron Corp., a Tustin, Calif., research software firm, has introduced eListen 3.0, a new platform release of the company's universal electronic sur-

vey and data collection software system. The new version provides integrated software tools for all major survey deployment and collection methods, including optical mark read (OMR) technology, from a single 32-bit Windows-based application.

The eListen 3.0 version allows users to preview the look-and-feel of a survey on the Web, e-mail, network, or OMR paper during the survey-building process. They can then distribute the survey to one or more of the deployment methods in a single step, followed by the collection of responses into an eListen database for reporting and analysis. Other major enhancements in the new release include: a response scale library that allows users to save and reuse Likert scales; save-and-resume capabilities for Web-deployed surveys; a spellchecker with dictionaries; direct import of PulseSurvey or Corporate Pulse survey files; and an enhanced analyzer featuring more output options, improved filter criteria, and the integration of third-party reporting tools such as Seagate Crystal Reports. For more information visit www.elisten.com.

Program looks at small-business financial market

Barlow Research Associates, Inc., Minneapolis, has announced a market research program focused on the small-business banking and financial services marketplace. The firm is conducting 3,600 interviews with small-business owners continuously throughout the year. Clients use an online database to access their market share and customer satisfaction and to evaluate sales performance. The research will utilize the Membership Research Group (MRG), a team of professionals whose primary focus is measuring the small-business financial marketplace on an ongoing basis. The Membership Research Group's Web site is www.membershipresearch.com. Preliminary research findings and small business analysts' reports are available to the

general public on the MRG site. For more information call John Barlow at 612-545-6620.

Products for data collection with Palm OS

Techneos Systems Inc., Vancouver, B.C., has introduced Entryware software, which allows electronic data collection using handheld computers running Palm OS. The Entryware product line, version 2.0, consists of three software components. The Survey Workbench is a Windows program that enables questionnaire design, downloading to a handheld computer, uploading of response data, and creation of a data set in industry-standard formats such as SPSS. The Survey Dataport includes the same functionality, with the exception of questionnaire design. It provides an alternative for data exchange at field locations. The Mobile Interviewer product runs on any Palm OS handheld computer. It manages presentation of the questionnaire to the interviewer, simplifying the interviewing process and reducing data entry errors. Entryware 2.0 software is available free for a 30-day evaluation at www.techneos.com or on CD by calling 888-282-0641.

Process Web info with Knowledgist

Software Boston-based Invention Machine Corporation has released Knowledgist 2.0 for market and technical research and analysis. The software tool has been enhanced to now analyze Web-based sources in addition to local information sources. This software is designed to reduce the amount of time people spend identifying pertinent information on the Internet, intranets, and on their own computer.

Using the company's semantic technology engine, the product processes large volumes of information and analyzes the interaction between words and the meaning of word combinations. Based on complex algorithms, the semantic processing engine divides the content into sentences, preserving the contextual relationships that aid in

understanding meaning. It then analyzes the sentences and creates a structured Knowledge Index based on the meaning of word combinations.

Knowledgist 2.0 includes expanded Web processing capabilities, including search access to over 700 Web sites grouped by industry. The Web search feature enables users to simultaneously search all sites included in user-selected industry groups, or specific sites within industry groups. The default group is General Search

Engines, which concurrently accesses multiple search sites such as Alta Vista, Excite, Google, and Northern Light. Knowledgist then reads and understands the results, analyzing the content to create the structured Knowledge Index.

The Web site processing feature has application in market research and competitive analysis. The software semantically analyzes a Web site based on a user-defined level of links explored during processing. For exam-



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ple, a user can enter the Web address of a site containing links to white papers, and then semantically process not only the specified Web site, but also the white papers and links to Web sites included in the white papers.

Other enhancements introduced with Knowledge 2.0 include expanded personalization features, improvements to the user interface, and a graphical representation of the processing results as a chart. Users can save the results of their search, including the links to the source documents, and then merge the Knowledge Indexes. For more information visit www.invention-machine.com or call 800-595-5500.

New online research product from MarketTools

Sausalito, Calif.-based MarketTools has debuted zTelligence, an online research and feedback tool for capturing and reporting relationship and market information. This Web-hosted application allows businesses to gather, analyze and share interactive data from customers, partners, vendors, investors and employees. ZTelligence

is an automated tool with a graphical interface that allows users to create and deploy surveys via e-mail, Web site or Web intercept. Users can view their results in real-time, and zTelligence's reporting features provide data in a presentation-ready format. ZTelligence can be used throughout the enterprise, across multiple departments. Administrative and security features give the organization the ability to specify user access and permission to all areas and functions of the tool. It provides a common platform to gather, analyze and share research data and allows for group collaboration on projects. For more information visit www.market-tools.com.

Digital Dashboard from Burke

Cincinnati-based Burke Interactive is now offering Digital Dashboard, a new way of reporting research results, including survey data and open-end responses, using the Internet. Individuals navigating Digital Dashboard can access survey results on a custom-designed Web site created to speed up the time-consuming process of research analysis. Data collected via Internet, phone, mail, mall-intercept or some combi-

nation of methods may be reported through Digital Dashboard. It's also possible to incorporate data from other sources, such as financial records, quality statistics or Web site log data. While users can access their findings at any time, their Digital Dashboard site is secure and password-protected, ensuring data confidentiality. A demo is available at http://report.burke.com/dd_demo.

Elevation data from Spatial Insights

Vienna, Va., software firm Spatial Insights, Inc. has completed the development of seamless Digital Elevation Model (DEM) data covering the continental United States. The DEM data were assembled from over 45,000 USGS 7.5' quadrangles after systematically correcting for pre-existing artifacts. The 30-meter data are available as pre-assembled seamless coverages by county, metropolitan area (MSA), or by any custom client-specified boundary. DEM data with 10-meter resolution are also available over some selected areas. The elevation data work directly with ArcInfo, ArcView, MapInfo Professional, Vertical Mapper, or decibel Planner, and are available in a number of industry standard formats, including .DEM, .GRD, and .MIG. For more information visit www.spatialinsights.com/data/elevation/dem.

Briefly...

Mature Marketing Research, Boston, has published "The Boomer Report," a quarterly survey of consumers aged 45-59. Categories include: automotive, computers and Internet usage and buying behavior, technology/electronic ownership, financial services (banking and investing), travel and vacation planning, restaurant usage, and health care/personal care. For more information call Leslie Harris at 617-720-4158 or visit www.maturemarketing.com.

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Nameless Corp., Ogden, Utah, is offering a way for employers to **survey and interact with employees**, and for clients to offer critiques of companies, anonymously and privately, using the Nameless Email Internet site, www.namelessemail.com.

Minneapolis-based data processing firm ADAPT Inc. has **expanded its comment-coding operation** to include online coding of open-ends from CATI and Internet surveys. The new service, ADAPT-CODE, uses proprietary software to manage, code, quality-check and output descriptive codes for open-ends provided in an ASCII format. For more information call Dave Koch at 888-52ADAPT.

Scantron Corporation, Tustin, Calif., has launched www.courseval.com, a **Web site offering free Web-based course and instructor evaluations and reports**. The site gives course instructors and administrators the ability to deploy secure Web-based surveys to students free of charge and without software downloads.

Profiware, a Bucharest, Romania software firm, is offering a **free evaluation copy of its time series software product**, Prognosis, at www.profiware.com. Prognosis uses artificial intelligence and statistical methodology to achieve forecasting accuracy. The program does not require any background in statistics or time series analysis.

Greenwich, Conn.-based online research firm InsightExpress has expanded its offerings to **support 20 new business-to-business audiences**, including industry groups such as automotive, education, and health care and job functions such as human resources, customer service and software development. For more information visit www.insightexpress.com.

The services of Hamilton, Va.-

based Info-stop.com, a custom research company, are now available online at www.info-stop.com. Info-stop.com's range of research services includes information searches, reports, topic summaries, periodic monitoring, abstracting and PowerPoint presentations. Info-stop.com's associates cull through information from a variety of sources, extracting what clients need and presenting it in a usable format. Info-stop.com's associates have expertise in a variety of disciplines including e-commerce, market research and analysis, international economics, telecommunications, health care, GIS technology, case law, funding and legislation.

Perseus Development Corporation, Braintree, Mass., a provider of Web-based survey research, has announced the Enterprise Service, an **integrated, Web-survey research solution**. The Enterprise Service is a combined service of several components: desktop survey design tools, Web-based analysis and reporting services, research consulting support, technical support services, and access to research information, resources and training. For more information visit www.perseus.com.

The L Report has launched an **online youth trend tracking study**, Lreport.com, which will track the behavior and attitudes of the early adopters in urban youth communities. The study will use Urban Pioneers, hand-selected young trend-setters who screen and recruit respondents for the quantitative study. Lreport.com will include extracts from interviews with urban young adults as well as visuals, street footage, and music links to bring the data to life. For more information call Claire Brooks at 858-794-6444 or visit www.lreport.com.

Itracks, Saskatoon, Saskatchewan, is now offering **version 2.11 of its online focus group software**. The update features automatic e-mail invitation capabilities, downloadable moderator's guides, transferable moderator's guides, recorded playback, and a review button. Users can accommodate a variety of browsers, and varying hardware and Internet connections. All activities are password-protected and hosted on a secure Web site and allow full access through firewalls. For more information call Doug Bates at 306-665-5026 or visit www.itracks.com.

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Klutch Swenson
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Survey Monitor

continued from p. 8

with American adults. Accuracy of the results is within ± 3.09 percent. For more information visit www.maritzpoll.com.

Respondents give Internet research high marks

A look at research methodology by Cincinnati-based Burke Interactive has determined that respondents find the Internet a fast, friendly and functional tool for data collection. In a study of nearly 900 people - all with Internet access - Burke found that an online survey took respondents, on average, just 12.5 minutes to complete, compared with 19.4 minutes for a telephone survey. At the end of the survey, 33 percent of those completing the questionnaire online indicated they definitely would participate in future studies, compared with 18 percent of the telephone respondents.

"These results indicate that Internet surveys can be shorter and sweeter than phone surveys," says Jeff Miller, senior vice president, Burke Interactive. "Saving time is something that both the researcher and the respondent can

appreciate, and the fact that participants are willing to help again adds to the appeal of Internet surveys."

The study attempted to isolate differences in responses directly related to the survey method. Participants were recruited over the telephone using a random-digit dialing technique. Only those with access to the Internet were given an option to participate in the study and individuals were randomly assigned to take the survey using the Web or the telephone. Burke conducted 386 Web interviews and 500 telephone interviews for the project.

Other key findings from the study:

- The Web can be an excellent avenue for measuring opinions on social, political, or other sensitive issues. Survey findings, however, can be interpreted very differently depending upon whether a "don't know/no response" option is included. If respondents are provided a "don't know/no response" option in a Web survey, a significantly higher percentage will select it than do so in phone surveys - particularly on sensitive issues.

In most cases, there is not a compelling reason to include "don't know/no response" options in Web surveys. If not given this "out," respondents tend to answer the questions.

There was no greater tendency for Web respondents to terminate the inter-

view if they were not provided these options, and these respondents actually responded more positively to the survey experience than Web respondents given the "don't know/no response" option.

- New-product demand forecasts might have to be readjusted if based on responses to Web surveys. Traditional purchase-intent surveys ask people if they "definitely will," "probably will," "might or might not," "probably will not," or "definitely will not" buy a new product.

Respondents to traditional phone surveys are more likely to use one of the extremes of the scale - "definitely will" or "definitely will not" - than are respondents to Web surveys. The study found, however, that question response options can be reworked in ways for which Web and phone respondents provide much more similar responses, opening the way for research programs to use combinations of phone and Web interviewing.

Despite the random assignment of respondents to cells, respondents who completed the survey over the Web tended to be more experienced Internet users than respondents who completed the survey over the phone. This suggests that any research on the Web is really done among a sub-sample of individuals with online access - those willing and able to make the necessary effort to complete the interview. For more information visit www.burke.com.

Barbecues not just for summer weekends

Eight out of every 10 adults grilled last year, according to a study by The NPD Group, Inc., a Port Washington, N.Y., research firm. People are grilling year-round, making barbecue grills one of the most popular heating appliances in the American home and creating new opportunities for marketers, reveals NPD's latest "Grilling In America" report, a survey of 12,800 nationally representative households.

As consumers look for ways to simplify food preparation, more people are relying on their grills for fast, con-

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venient family dinner meals. Seventy percent of grilled dinner meals take thirty minutes or less to prepare, compared to half of dinner meals overall. In keeping with the changing needs of meal preparers, 31 percent of adults agree that grilling involves less cleanup, takes less time, and allows them to capitalize on convenience and health-consciousness without sacrificing taste, the number one reason that consumers grill.

"Americans turn to the grill for a few reasons," says Arnie Schwartz, NPD's vice president of National Eating Trends. "While it adds taste varieties to the meal routine, it also makes life a little easier. There aren't any pots and pans to clean up; the meals tend to be simpler; and if mom is clever, she can recruit dad to actually do the grilling since the numbers show that men cook on the grill more frequently than women."

This combination of taste and convenience is prompting Americans to fire up their grills throughout the week. Although grill usage skews more toward the weekend, especially Sunday, which accounts for 23 percent of all grilling, 60 percent of grilling takes place on weekdays. Nine out of every 10 grilled meals are prepared for family members only.

Summer months are peak season for barbecuing, but winter, spring, and fall are also popular. Surprisingly, growth is occurring in all regions during the winter season, with one out of every five households grilling during the colder months. Gas grill users tend to grill more year-round than charcoal grill users.

While virtually all household segments have seen growth in grill usage over time, the research found that higher household income translates into higher grill usage. Of all the household segments polled, working parents have increased their use of the grill most dramatically over the past decade to become the largest sector of the population who grills.

Throughout the 1990s, the gas grill has advanced as the most popular type of grill. More households (over one-half) own gas grills than any other type of grill; 30 percent own charcoal

grills and 14 percent own indoor grills.

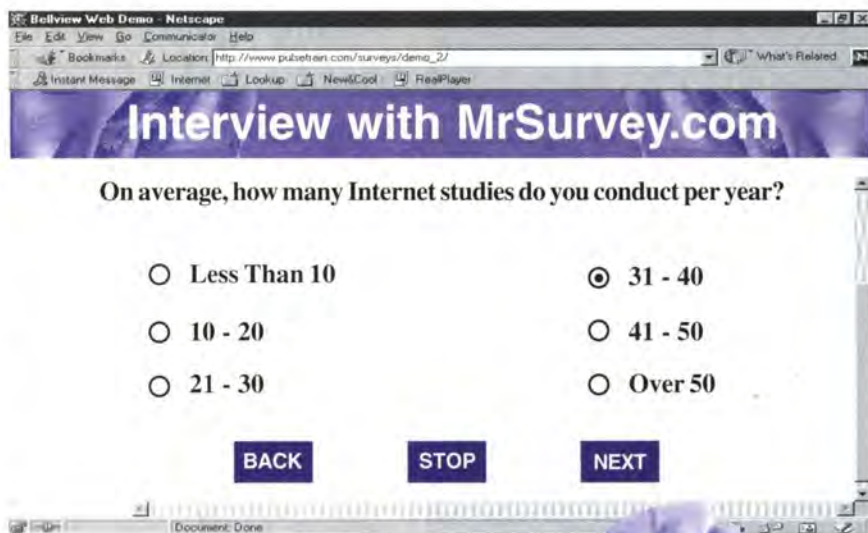
The six most popular items for grilling account for two-thirds of all foods prepared on the grill. Steak (19 percent), chicken (15 percent) and burgers (13 percent), the top three, account for 47 percent. Hot dogs (8 percent) and pork chops (6 percent) are next on the list. One of the fastest-growing foods grilled is potatoes, which doubled in popularity since 1996 (1996, 3 percent; 1999, 6 per-

cent).

As Americans grow more accustomed to preparing their entrees on the grill, NPD predicts side dishes may provide marketers the next big opportunity. Despite potatoes' grilling popularity, only 7 percent of dinner meals include a grilled side dish.

"There's an untapped opportunity to offer side dish products or packages that can be cooked on the grill, right next to the steak or chicken," says Schwartz. "Manufacturers who want

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to take advantage of this market should work towards creating good-tasting products that leave nothing to clean up afterwards."

The "Grilling In America" study is a combined study of more than 12,800 households surveyed from 1990 through 1999 by National Eating Trends, The NPD Kitchen Audit, CREST, and NPD Online. The sample is demographically and geographically balanced to U.S. Census Bureau statistics. Results are balanced to reflect total behavior across the U.S. For more information visit www.npd.com.

Study looks at e-shopping cart abandonment

"Click-Here Commerce 2000," a study of the success factors of online stores, has identified the source of the disturbing consumer disease: shopping cart abandonment syndrome. The research, by Shelley Taylor & Associates, a Palo Alto, Calif., consulting firm, found that online vendors, some of the hottest names in e-tailing, are responsible for the latest outbreak in customer frustration, anxiety and shopping cart abandonment, symptoms caused by poor Web site design. Further, the research has found that the disease is highly contagious and is spreading rapidly to business-to-business online purchasers.

The study evaluates 100 online stores - 70 U.S. and 30 U.K. - representing a cross-industry sample, including: apparel, books/CDs/entertainment, flowers & gifts, food & wine, health & beauty, home & garden, office supplies, pets, software, sporting goods and toys. Sites were evaluated using more than 350 proprietary evaluation criteria. Some of the online stores that have been evaluated include: Amazon.com, CDNow, Gigabuys.com, Nordstrom, Toys R Us, Victoria's Secret in the U.S. and Boots, Debenhams, Thomas Cook, Waitrose and W.H. Smith in the U.K.

Web site content is extremely dependent on available navigation tools. If users cannot find needed information quickly and easily, the content - whatever its quality - is virtually useless. Only 8 percent of online stores provide telephone numbers on their home pages. Only 37 percent of U.S. and 50 percent of U.K. sites have a first-time user's guide. The absence of pre-sale assistance is probably the No. 1 reason for shopping cart abandonment in the online store. Shoppers will simply leave without their desired goods if they don't get answers to their questions.

The most useful product information to a critical shopper is most often neglected. E-commerce sites should therefore endeavor to provide multiple levels of product information and take advantage of traditional merchandising wisdom. Only 16 percent of U.S. and 3 percent of U.K. sites present customer reviews; even fewer provide third-party reviews. Only 8 percent provide feature/benefit comparisons of products.

A good way to frustrate and alienate customers is to have them decide to purchase an item and go through the trouble of entering credit card information - only to learn that the item is not in stock! Only 29 percent of U.S. and 13 percent of U.K. sites state whether products are actually available in the online shopping cart.

Post-sale product service and support determines customer loyalty. It gives customers the opportunity to voice their needs and creates a potent source of ideas for future product development. Building and sustaining relationships with existing customers creates the potential for repeat business and costs less than acquiring new customers. "Virtual" support must become actual support in order to create repeat business. Less than half of sites, 44 percent, contain some form of post-sale support. Only 14 percent of sites provide a direct link to a shopper's order status on their global navigation bar and only 22 percent have a link on their home page. For more information call 650-473-6514.

Research Industry News

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Box 185724, Hamden, Conn., 06518.
Ph. 203-387-4211. E-mail
RADM@att.net.

IBM has acquired **Aragon Consulting Group**, a St. Louis marketing research and strategy firm. Financial terms of the acquisition were not disclosed.

Chicago-based **Information Resources, Inc.** has formed an alliance with technology information provider **PC Data** which will link PC Data's Internet metering technology with IRI's Shoppers' Hotline panel of 55,000 households to help consumer packaged goods manufacturers tie Internet usage to online and offline consumer behavior. Additionally, PC Data's own panel of 120,000 households will be available to IRI customers for custom online survey research.

Honduras-based research firm **Le Vote** and Rochester, N.Y.-based **Harris Interactive** have signed an exclusive agreement which adds Le Vote/Harris Interactive as a member of Harris Interactive's global network. Le Vote/Harris Interactive will develop a database of cooperative respondents in Central America for market research projects. In addition, **MASMI Research**, a research firm in Russia, the Commonwealth of Independent States and Eastern Europe, has also joined the Harris Interactive global network.

Concord, Mass.-based **MORPACE Pharma Group, Ltd.** (MPG), a health care information and analysis company, has collaborated with **Viridien Technologies**, a developer of e-business services and solutions, to build five new Web sites designed to leverage the Web's capabilities for collecting data and enhancing information flow between MPG and its physician network.

Media Metrix, a New York Internet

and digital media measurement firm, has announced enhancements to its Local Market Report on Internet and digital media usage in local markets. Through an alliance with International Demographics, Inc., a local-market qualitative research firm, Media Metrix will provide clients with expanded profiles of online users, enabling them to better understand and target audiences on a local level.

MarketTools, Inc. and **Sawtooth Software, Inc.**, Sequim, Wash., have formed a partnership that will enhance MarketTools' zTelligence system through the development of Web-based conjoint analysis modules based on Sawtooth Software's research software products. ZTelligence, an online platform for collecting, analyzing and reporting relationship and market information, will be used to deliver these jointly-developed applications. Separately, MarketTools has partnered with Internet content provider ChinaLOOP to conduct consumer and market research in China via the Internet.

St. Louis-based **Maritz Marketing Research Inc.** has acquired **Basis-Kontakt**, a Hamburg, Germany, research firm. The terms of the acquisition were not made public; Basis-Kontakt's 1999 revenues were \$3 million.

In August, Rochester, N.Y.-based **Harris Interactive** filed a lawsuit in U.S. District Court for the Western District of New York against a number of Internet service providers (ISPs) which Harris claims have blocked it from corresponding with some of its registered online panelists. The company is seeking injunctive relief and significant monetary damages from America Online (AOL), HotMail, Qwest (USWEST) and others. These ISPs all subscribe to the Realtime Blackhole List (RBL), which is maintained by Mail Abuse Prevention System, LLC (MAPS), a Redwood City, Calif., monitor of electronic mail abuse. MAPS is also named as a defendant in the suit.

"MAPS has listed some of Harris Interactive's network resources because we have received complaints about their mailing practices, and they are not willing to provide meaningful assurances that Harris will protect the rights of consumers and network owners by confirming that the person to whom they are sending e-mail actually wants to receive that e-mail. We tried to work with them, but they were unwilling to make substantive changes. RBL listings are always a last resort," said MAPS spokesperson Kelly Thompson in an August 2 MAPS press release on the matter.

The decision by MAPS to add Harris Interactive to the RBL prompted the ISPs to block the company from corresponding with the ISPs' subscribers. The blocking affected approximately 2.7 million of Harris Interactive's panel members, including approximately 600,000 panelists who have participated in Harris Interactive-conducted market research. The blocking also is preventing certain interested parties from accessing Harris Interactive's Web sites and joining the Harris Interactive panel. The "causes of action" against the plaintiffs in this case include anti-trust violations and range from interference with business and commercial disparagement to negligence and defamation. In addition to the other defendants, Harris Interactive named market research firm Incon and its president, Martin Roth, separately as defendants due to their role in "nominating" Harris Interactive for the MAPS RBL.

In a related action, the suit also includes an anti-trust complaint against AOL, which owns both Netscape and a market research competitor of Harris Interactive's, Lewisville, Texas-based Digital Marketing Services (DMS). Harris Interactive contends that AOL's block gives DMS an effective way to limit Harris Interactive's ability to compete against DMS in the marketplace.

Minneapolis-based marketing agency **Gage Marketing Group LLC** has joined with **Leede**

Research, Manitowoc, Wis., to form a new marketing research firm called The Leede Group. The Leede Group will provide qualitative and quantitative marketing research to Gage's clients as well as to its own clients. Located in Gage's headquarters in Minneapolis, Leede will have focus group facilities and usability laboratories for Internet and Web design testing. Dean Halverson, CEO of Leede Research, will become CEO of The Leede Group.

Greenfield Online, a Wilton Conn., research firm, has launched Greenfield Online Mexico, bringing its Web-based research tools, market trend reports, syndicated and other studies to businesses in Mexico and subsequently, Latin America. Blockbuster Mexico is Greenfield Online Mexico's first client.

St. Louis research firm **Marketeam Associates**, celebrating its 30th year as a market research provider, has launched a new Web site at

www.mkteam.com.

Modalis Research Technologies, Inc., San Francisco, announced that **bmp eBusiness AG**, a Berlin-based venture capital firm, has taken a 6 percent stake in the company. The proceeds of the transaction will be used to expedite the opening of local offices around the world. The total amount of funding acquired in this round of financing amounts to just over \$5 million.

New York-based **Cyber Dialogue** has launched the marketing intelligence portal for its Arc 360° eCRM platform. The portal enables Cyber Dialogue's clients to manage their marketing initiatives by providing Web-based access to customer activity reports, strategic data and eCRM trends and by permitting clients to select market segments for targeted acquisition, retention and cross-sell campaigns.

Separately, the firm announced that Talkcast, a U.K.-based digital media

and communications company, will use Arc 360° to integrate visitor data in a centralized database for reporting, analysis, predictive modeling and campaign management.

The Marketing Research Association, Rocky Hill, Conn., has launched an online bookstore as part of the Amazon.com Associates Program. The bookstore, accessible at www.mra-net.org, will provide a direct link to over 1,200 titles that fall into the opinion and marketing research category.

New York-based **MarketResearch.com, Inc.** has entered into an agreement to acquire key assets of **Newsletters.com, Inc.**, Rockville, Md. Under the terms of the agreement, MarketResearch.com will acquire relationships with over 100 market research and business-to-business newsletter publishers, as well as technology infrastructure for the management and delivery of digital content.

Separately, the firm has launched an updated version of its Web site, including its proprietary "slice and price" technology that allows clients to order discrete segments such as chapters, charts, tables or individual pages and review and print the content at their desktop.

Consumers Union, publisher of *Consumer Reports* magazine and Consumer Reports Online, and **Active Research**, Burlingame, Calif., have announced an agreement to make Active Research's product data and information on a broad range of consumer goods available to *Consumer Reports* subscribers. Active Research will provide detailed product information and images on consumer electronics, baby products, home office equipment, appliances, lawn and garden products, and tools.

Minneapolis-based **Interelate**, a business analytics application service provider, has released the research paper, "Outsourcing Customer Relationship Management Functions,"

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written by Doran Levy, the firm's senior analytics officer. The paper reviews trends and issues an organization faces in outsourcing IT functions. It also explores the concept of outsourcing CRM functions in the ASP business model, particularly for marketing analysis. The paper is available on Interelate's Web site at www.interelate.com/ourmarket.res.asp.

Seattle-based online research information provider **DeepCanyon** has expanded the media, telecommunications and wireless industries research offerings on the DeepCanyon.com site through new agreements with Pyramid Research and Veronis Suhler. Pyramid Research specializes in the telecom and wireless industries and their component parts, while Veronis Suhler's expertise is in the media, communications, and information industries. Separately, DeepCanyon also announced a strategic alliance with Reuters Business Insight to bring Reuters Business Insight to the DeepCanyon site. Reuters Business Insight is a series of management reports jointly produced by Reuters and Datamonitor PLC.

DecisionVelocity, an affiliate of Kansas City research firm Decision Insight, has obtained seed capital to finance the next growth phase, the market rollout to research buyers. DecisionVelocity, a business-to-business ASP, specializes in customized applications for buyers of marketing research who are open to nontraditional techniques. The DecisionVelocity process delivers multimedia-enriched research applications via the Internet. New applications incorporate sound, visuals and motion.

Q2 Brand Intelligence, a Seattle brand research and business strategy company, has opened a Boston division.

Greenwich, Conn.-based **InsightExpress.com**, an online market research service, has signed 13 strategic alliances with media outlets,

business portals and software companies which will offer automated market research services to a wider audience.

Advantis Research & Consulting, St. Paul, has introduced a Web site at www.advantisresearch.com.

Catapult Systems Corp., an Austin, Texas, provider of e-business products and services, has announced that Griffin Bacal ad agency has selected Catapult's Inquisite survey system for its online marketing research surveys. Separately, StorageTek, a Louisville, Colo.-based global information storage provider, has also selected Inquisite for its online customer and employee surveys.

Lothar Fritsch has opened a new full-service research firm, **MinetheSoul**, at 1 Wiltshire Ave., Studio 127, Toronto, Canada, M6N 2V7. Phone 416-653-0168. Fax 416-653-6031. E-mail Lothar@minethe-soul.siteaction.com.

Michael Zicha has opened **Zicha & Associates**, a research firm located at 12 Manchester, Streamwood, Ill., 60107. Ph. 630-289-9147. E-mail zicham@aol.com.

Stamford, Conn.-based **@plan**, an Internet marketing research firm, has launched the Institute for Online Commerce. The @plan Institute For Online Commerce will offer consumers, the media, opinion leaders and market analysts data concerning online consumer preferences, behavior, and attitudes towards key online issues.

In June, New York Internet traffic measurement firm **Media Metrix** announced it would acquire New York-based **Jupiter Communications** for \$414 million in stock to create a new company that will combine Internet tracking with market research and analysis. Earlier this year, Jupiter paid \$50.6 million in cash and stock to acquire privately held Internet Research Group and Net Market Makers in an attempt to offer more business-to-business research.

Opinion Research Corporation, Princeton, N.J., has signed \$2.3 million in contracts with a global high-technology company for the continuation of a global brand image tracking program and related research. Separately, the firm announced that its offices in Maumee, Ohio, and Bingham Farms, Mich., have



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Research Calendar

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information call 650-365-1833 or visit www.tragon.com.

FALL EDUCATION CONFERENCE:

The Marketing Research Association (MRA) will hold its fall education conference on November 8-10 in Ft. Lauderdale, Fla. For more information visit www.mra-net.org.

CONFERENCE ON AGING:

William Paterson University is sponsoring a conference on aging entitled "Aging in America: Economic, Social and Political Points of View." on November 9-10 at the Marriott Hotel in Teaneck, N.J. For more information contact Leslie M. Harris at 617-720-4158 or at MMRHarris@aol.com.

INSURANCE RESEARCH CONFERENCE:

The Society of Insurance Research will hold its annual conference on November 12-15 at the Hyatt Regency Riverwalk Hotel in San Antonio, Texas. For more information

contact Stan Hopp at 770-426-9270 or at stanhopp@mindspring.com or visit www.sirnet.org.

ESOMAR ADVERTISING CONFERENCE:

The European Society for Opinion and Marketing Research (ESOMAR) will hold its "Advertising 2000" conference on November 12-14 in Rio de Janeiro. For more information visit www.esomar.nl.

SEGMENTATION CONFERENCE:

The Institute for International Research (IIR) is sponsoring SCOPE 2000, a customer segmentation and relationship marketing conference with the theme "Integrating Customer Knowledge Across the Organization to Build Profit," on November 12-15 at the Hyatt Regency Scottsdale at Gainey Ranch, Scottsdale, Ariz. For more information call 888-670-8200 or visit www.iir-ny.com.

ASIA MARKETING CONFERENCE:

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on marketing in

Asia-Pacific on November 26-28 in Bangkok. For more information visit www.esomar.nl.

SAWTOOTH TECHNOLOGIES SEMINARS:

Sawtooth Technologies will hold the following seminars near the company's offices in Evanston, Ill.: conjoint analysis: theory and practice, December 4-5; introduction to the ACA System, December 6; introduction to choice-based conjoint, December 7. The seminars are designed for researchers who have had little or no practical exposure to the techniques. For more information call Sue Taviton 847-866-0870 or visit the company's Web site at www.sawtooth.com.

ONLINE RESEARCH STRATEGIES:

The International Quality & Productivity Center will hold a conference titled "Strategies to Improve Online Market Research" on December 12-13 at the Hyatt Regency, New Orleans. For more information call 800-882-8684 or visit www.iqpc.com.

achieved ISO 9001 Certification.

Internet audience measurement firm Nielsen//NetRatings announced that Yahoo! Inc. has subscribed to the Nielsen//NetRatings service in 14 countries in North America, Europe, Latin America and Asia Pacific.

Broomfield, Colo.-based Abacus Direct, a division of DoubleClick Inc., has launched a series of syndicated market research products which will target Abacus' core market segments: catalog, retail, business-to-business, publishing, and online areas. To complete the market research project, Abacus has formed a partnership

with Dipankar Chakravarti and the University of Colorado.

Schaumburg, Ill.-based ACNielsen U.S. and Norwalk, Conn.-based Adams Business Research, an operating unit of Adams Trade Press, Inc., will expand their multi-channel liquor sales information service, LiquorScan. The service now includes census-based, account-specific reporting for liquor store retailers ABC Fine Wine & Spirits, Boston-based Kappy's, Spirits Unlimited of New Jersey and Goody-Goody of Dallas.

New York-based Arbitron Company has entered into a strategic alliance with Lariat Software, Inc., a developer of streaming media infrastructure solutions, to power InfoStream, a Webcast audience ratings service. Under the terms of the agreement, Lariat will license its MediaReports software to Arbitron for use in the collection of data from

streaming media servers for the InfoStream ratings.

Hudson, Mass.-based C Me Run Corp., an Internet computing company, has announced that Market Perspectives, Inc. will provide online survey tools to help C Me Run garner and act on user response to C Me Run's services.

San Diego marketing information firm Claritas Inc., has announced the formation of the MyBest... suite of Internet-deliverable products with the first in the series of Web sites called MyBestProspects. The new sites will be a component of the ClaritasExpress portal site. MyBestProspects allows the user to identify and target qualified prospects by providing over 500 product and service usage categories, ranging from restaurant preferences to media behavior.

Elrick & Lavidge Marketing Research (E&L), Atlanta, has formed



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an agreement with **America Online** under which it will provide visitors to Shop@AOL with independent reviews of merchants, including ratings of key factors that lead to a successful online shopping experience. In addition to providing independent merchant reviews to the consumers, E&L's research will offer feedback to Shop@AOL merchants regarding consumers' experience on the merchants' Web sites, which they obtain from consumers by giving them the opportunity to participate in short online surveys.

The United States District Court for the Southern District of New York dismissed a part of an antitrust lawsuit brought by **Information Resources, Inc.** against the **ACNielsen Corporation**. ACNielsen and the other defendants moved for partial summary judgment on IRI's non-U.S. antitrust claims. The court granted the motion and dismissed those claims, ruling that IRI could not assert claims based on defendants' alleged activities in foreign markets where IRI operates through subsidiaries, companies owned by joint ventures, or relationships with local companies. IRI brought its lawsuit in 1996, alleging a variety of anticompetitive activities by The Dun & Bradstreet Corporation, ACNielsen, and IMS International, Inc. abroad, as well as in the United States. IRI claimed worldwide antitrust damages.

Survey.com has moved to 1282 White Oaks Rd., Campbell, Calif., 95008. Phone 408-907-0001. Fax 408-369-9746.

Jim Shur, president and owner of **Pathfinder Research Group**, Acton, Mass., has sold his business to **Q Research**, Newton, Mass. The new business will operate under the Pathfinder Research Group name in its present location and be owned and managed by Karen Daily Stahl and Ed Stahl.

St. Louis-based research firm **Quality Controlled Services** has opened a new facility near Phoenix in

the Papago Spectrum in Tempe, Ariz.

Qualitative research firm **The Clowes Partnership** has moved to 373 Saybrook Rd., Higganum, Conn., 06441. Phone 860-345-4570. Fax 860-345-4860.

Results Thru Research has moved to 12 W. 37th St., 4th fl., New York, N.Y., 10018. Phone 212-736-0008. Fax 212-736-0794.

INRA (EUROPE), in partnership with **GfK Group**, has won the contract to conduct the European Commission's standard Eurobarometer survey, which polls over 85,000 people in 15 countries each year about issues of concern to the European Union.

Decision Analyst, Inc., Arlington, Texas, has created an advisory council designed to give physicians and surgeons a greater say in the shaping of health care policy and products. Called the Physicians Advisory Council, the program includes a Web site (www.physicianscouncil.com) where physicians worldwide can participate in Decision Analyst surveys pertaining to health care issues. Separately, the firm has expanded to 100,000 the number of Europeans who are members of American

Consumer Opinion Online, Decision Analyst's online panel.

In July, **National Computer Systems**, Eden Prairie, Minn., announced it was being sold to **Pearson PLC**, an international media, publishing and education company. The transaction is valued at about \$2.5 billion. The deal was expected to be completed in September.

The Coleman Group, a Minneapolis-based design consulting firm, has introduced its Brand Strategy Team, headed by Rina Papler, which will integrate brand strategy development with naming, product design and packaging efforts.

Opinion Access Corp., Long Island City, has expanded its telephone interviewing capacity to 200 stations. The stations are 100-percent CATI, using both TelAthena and CfMC software integrated with EIS predictive dialers.

Essman/Research, Des Moines, Iowa, has been chosen as one of the top 10 focus facilities in North America by the moderators and researchers who participated in the 2000 edition of the Impulse Survey of Focus Facilities.

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Ariba

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a system that could help them evaluate the quality of their customers' experience immediately after their technical support issue was resolved.

"We are now receiving many more calls from a more diverse customer base, each using different products. In

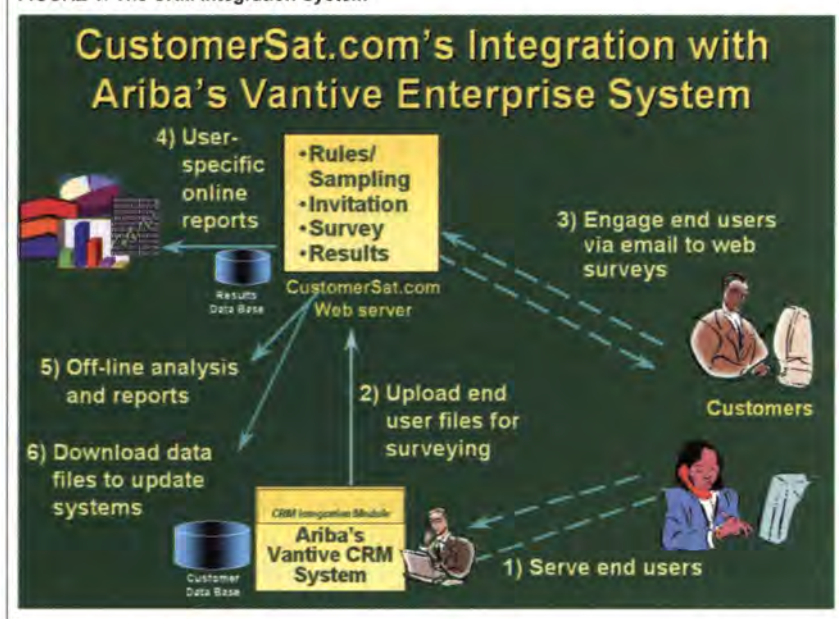
money while improving the customer experience.

Ariba also determined it would be useful to isolate any technical-support trends specific to a certain customer parameter - such as the region where the customer was located, or product the client was using - to deal with them more efficiently. Customers in Asia-Pacific, for example, dealt with differ-

tomers groups.

That was the missing ingredient in Ariba's previous CRM system: a transaction-based, uniform, real-time customer feedback solution that could provide actionable information for Ariba employees at all levels. Furthermore, because of Ariba's global reach, any system needed to be accessible on-line and include reporting capabilities tailored to fit Ariba's employee needs. This type of solution would allow Ariba to streamline its processes and improve responsiveness to its customers.

FIGURE 1: The CRM Integration System



The solution

CustomerSat.com provided a solution to Ariba's challenges with its Web Survey System and automated CRM Integration Module. Working with Ariba's technical staff, CustomerSat.com consultants were able to customize a transaction-based customer satisfaction survey system that integrated with Ariba's existing Vantive CRM system (Fig. 1).

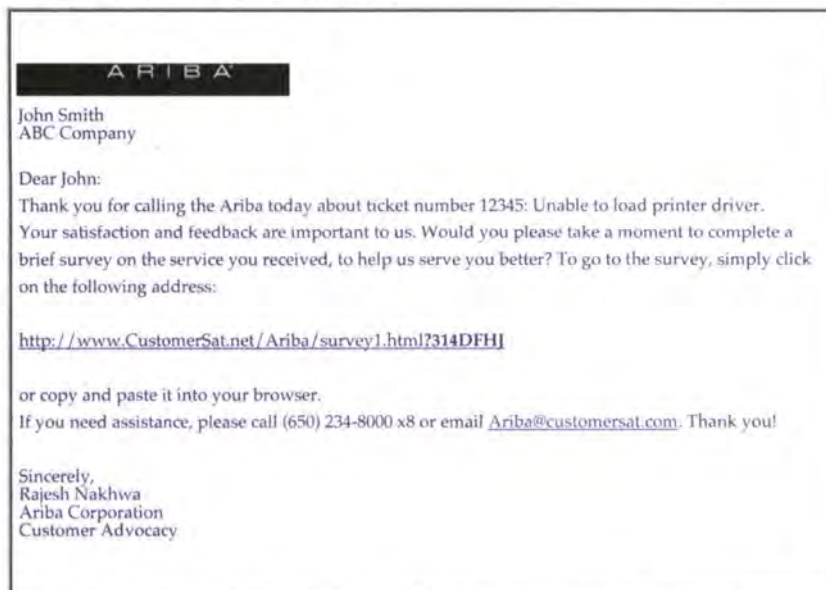
Ariba customers are now invited to rate and comment on their technical support experience within 24 hours after the case is closed. This allows customers enough time to reflect on their experience while ensuring that the response accurately reflects their true feelings. The system deploys a personalized survey invitation via e-mail to each customer after the case is

the past, our total monthly call volume was generated by a relatively low number customers; 100 customers could have been responsible for 600 calls into the center," says Ariba's North American Technical Support Manager Rajesh Nakhwa. "It was fairly easy for those customers to recall their experiences in a quarterly survey. But as new products resulted in more single-time inquiries, we required a system that allowed our customers to give us instant feedback."

With this information in hand, Ariba's technical support managers knew they needed to better determine key drivers for customer satisfaction. In turn, they could implement employee training programs targeting specific client concerns, isolate best/worst practices scenarios, and more. Additionally, Ariba's management thought if they could pinpoint a set of standard problem-solving strategies that were most effective in similar scenarios over time, they could standardize the solution - saving both time and

ent challenges than customers in North America. Thus, Ariba needed region-specific solutions that could be implemented in its technical support system to better serve these distinct cus-

FIGURE 2: Personalized Email Invitations



A personalized e-mail survey invitation customized from Ariba is sent containing survey URL with Positive Respondent Identification.

FIGURE 3: Customized Surveys

Welcome to Ariba Customer Satisfaction Survey! Microsoft Internet Explorer

Making the net work for B2B™

Welcome to The Ariba Technical Support Customer Satisfaction Survey!

Ariba continuously strives for consistent responsiveness, quality, delivery and communication on the issues that you log with us. Your feedback is an important part of this process.

For this survey, please provide feedback on your recent experience with Ariba Technical Support.

Case ID:
Case Description:
Case Closed Date:
Agent Name:

1. Considering your recent experience, how satisfied were you overall with Ariba Technical Support?

Very Dissatisfied					Very Satisfied					
1	2	3	4	5	6	7	8	9	10	N/A
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

2. For each statement below, please rate your experience with Ariba Technical Support Organization for the case stated above. In the scale below, 1 is Very Dissatisfied, 5 is Neutral, 10 is Very Satisfied and N/A is Not Applicable.

	1	2	3	4	5	6	7	8	9	10	N/A
It was easy to get in touch with Ariba Technical Support.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Initial response to my case occurred in a timely manner.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support engineer understood the details of my case.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support engineer demonstrated technical competence on the case topic.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support engineer communicated status of case resolution at each stage.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support engineer provided an answer/workaround in a timely manner.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Support engineer treated me as a valued customer.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Effectiveness of escalating the case if applicable.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

The survey is customized to reflect the "look and feel" desired by Ariba in order to ensure proper branding and corporate identity.

Typically, Ariba fields about 3,000 technical support inquiry calls a month. "We get calls as simple as 'I can't log in' to very complex questions that take several days to resolve," Nakhwa says. "Every inquiry, however simple or complex, gets an instant survey as soon as that case ticket is closed."

The Web Survey System checks that each customer data record is complete and that e-mail addresses are meaningful (for example, containing an "@" and a "."). The record is then encoded to ensure that only the invited customer can respond to the survey and respond only once. At that point, a customized e-mail survey invitation from Ariba is generated and sent to each customer (Fig. 2).

resolved, in accordance to business rules set by Ariba. When the case ticket is closed, CustomerSat.com's CRM Integration Module saves contact and

ticket information from the Vantive system to a file, which is then uploaded to CustomerSat.com's Web site.

To guarantee maximum response rates, the e-mail survey invitation and the survey itself are personalized,

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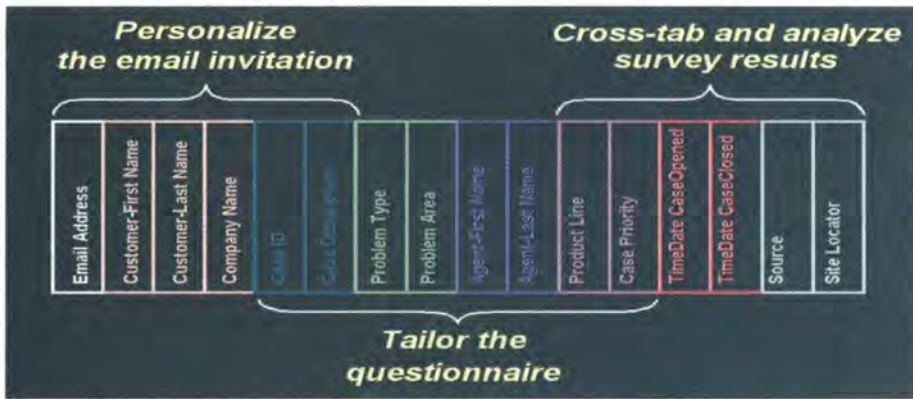
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FIGURE 4: Uploading Variables from Ariba s Vantive CRM System



Ariba and CustomerSat.com agree on contact, demographic, case-specific, and other relevant data to be automatically uploaded as each customer is surveyed.

ny name, the WSS can upload variables from Ariba’s customer information and case information databases including, address, region, technical support representative ID, product ID, date, time, etc. All of this data is sent to the WSS through the CRM Integration Module. This was a critical component for Ariba in its efforts to isolate trends in its technical support solutions.

Ariba decides on which variables it uses to key its reports, based on its own business rules (Fig. 4).

A range of real-time analyses and reports are available to Ariba’s authorized personnel at any time in Ariba’s password-protected account; they are always current as of the most recent survey response. The reporting system can display the survey information based on any number of variables, such as geography, call center ID, representative ID, product line, etc. In addition, these queries can be viewed in different chart formats (Fig. 5)

including Ariba’s company logo and customer-specific information such as first and last name, e-mail address, company name, case ticket number and case description, pertinent to each individual customer. Additionally, to facilitate candid responses, CustomerSat.com hosts the survey, assuring the respondent of confidentiality, if desired. The customer then clicks on the URL to view and complete the survey (Fig. 3).

“A key driver for Ariba is respecting the customer’s time,” says Jose Ver, CustomerSat.com senior project man-

Other demographics

Personalization of the survey invitation is a key component in generating survey responses from customers. But beyond that, Ariba wanted a host of other customer and case demographics to be uploadable from their CRM so that the views of survey results (the data that is actually displayed on the computer monitor or in printouts) could contain reporting data from a variety of perspectives. This required a system that allowed multiple methods of data filtering, “slicing and dic-

variables it uses to key its reports, based on its own business rules (Fig. 4).

A range of real-time analyses and reports are available to Ariba’s authorized personnel at any time in Ariba’s password-protected account; they are always current as of the most recent survey response. The reporting system can display the survey information based on any number of variables, such as geography, call center ID, representative ID, product line, etc. In addition, these queries can be viewed in different chart formats (Fig. 5)

FIGURE 5: Real-time Online Reporting



Using CustomerSat.com’s Web Survey System tools, Ariba can view results in real-time in any number of formats including bar charts, pie charts, trend lines, and more.

ager. “Ariba is extremely concerned that the survey be brief; at most a few minutes should be required to respond, a message which was clearly conveyed in the invitation.”

ing,” as well as reporting capabilities and the ability to manage users through a master account holder.

Along with case number, case description, e-mail, name, and compa-

Managing users

The Web Survey System allows hierarchical access to survey results, allowing a master account holder at Ariba to administer levels of access for other users. Through this feature, different regional and product managers may access and view customer feedback that is pertinent to their particular job responsibilities.

For example, a manager of a call center in Europe may need to see the survey data that involves calls handled throughout Europe as well as or within a specific region. Similarly, a product manager for the Ariba Buyer product line may only need customer feedback on that particular product. In addition, managers can compare these segmented views with the global view of data. The “controlled access and managed users” features make data analysis manageable and allow cross-segment comparisons. “The overall trends are important to the company at large,

but I want to know specifically how my group is doing in relationship to the overall technical support division," Nakhwa says.

Alerted immediately

In certain situations, Ariba wants to be alerted immediately about the results of a survey. For example, if a customer responds with a low satisfaction rating to a question asking for overall impressions of a technical support experience, Ariba wants to know about it and respond to the problem quickly. In these instances, an e-mail message is automatically generated by the WSS and sent to an appropriate representative at Ariba, who can then resolve the issue.

Ariba has experienced measurable results since implementing the new system, including:

- When Ariba receives a low overall satisfaction score, the representative can immediately contact the customer to determine the key reasons for the dissatisfaction. This has helped in resolving customer issues, and moved customers from dissatisfied to satisfied.

- Results have demonstrated to Ariba officials that customer satisfaction ratings of the technical support division have exceeded expectations.

- One of Ariba's primary goals is to move customers rating their service as 7 or below (on a scale of 1 to 10) up the scale to a satisfied or very satisfied customer. Already, the open-ended customer comments portion of the survey have yielded immediate results in this area.

- The system has helped Ariba team morale. For the first time ever, Ariba customers can nominate representatives for excellent support services commendations through a question contained in the Web survey.

"This is a great way to measure and actually track and get trends so we can intervene before things blow up," says Nakhwa, who was a lead contact for Ariba in bringing the system online. "We've found that sometimes a simple follow-up phone call or e-mail after the case is closed can be the difference between a customer being satisfied or very satisfied. So now, even if my rep-

resentatives are 100-percent sure the solution worked, I tell them to give that extra call or send that extra e-mail. It makes a difference."

And to Ariba, customer satisfaction makes all the difference.

Surveying the future

As an e-commerce provider, Ariba maintains a strong relationship with its customers. Its global technical support division, with offices in North America, Europe and Asia Pacific, provides both regional as well as product-based expertise for its clients. Customer feedback will continue to be a critical driver in product support.

Ariba envisions a myriad of opportunities to expand its use of WSS. Cultural considerations when devising unique Web surveys and e-mail invitations, for example, will become more critical as the global economy expands. A Web-survey invitation written in French as well as English, for instance, is more likely to elicit a higher percentage of respondents than if it were written in English only when the audi-

ence is French-speaking.

Ariba also foresees the expansion of its WSS into all phases of its operation. As the task of assuring customer loyalty continues growing into a round-the-clock job - whereby every single customer experience is seen in the larger context of the customer's ongoing relationship with the company - real-time feedback will play an even more crucial role. Down the line, Ariba envisions WSS becoming a 360-degree solution, where the survey information is fed back into Ariba's CRM to be used by other departments, including sales, marketing and product development.

As the Internet continues to become more widely used as a customer support tool, conventional distinctions between receiving service, providing feedback on service, and customer-initiated training and development programs will continue to blur. All will present new challenges and opportunities, and Ariba promises to be at the forefront, striving to improve and sustain its strong customer relationships. **74**

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continued from p. 21

- containment and forecasting of costs;
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- history of reasonable and cooperative behavior and business-like concern for the interests of the customer; and
- service to the end user of the product or service.

These topics address some of the key

issues for technology buyers. However, what buyers need to know in order to make intelligent choices is less than what vendors need to know to manage their business effectively.

Developing the measurement system

Unisys U.S. Federal Government Group actually began monitoring customer satisfaction in 1984. This was a natural outgrowth of a culture of focusing on satisfying customers and of a corporate "listening" program, which

sensitized employees and customers to the benefits of listening to one another.

For almost 13 years, the Group conducted an annual assessment by mail, using questionnaires sent to customers or distributed by relationship managers. The questionnaires were short and concise, and the data used to create a variety of reports for multiple levels of management.

In 1998, the satisfaction measurement team decided to move away from the mail survey format. The issues with mail included:

- A declining response rate. The response rate had eroded over time, dropping to below 40 percent. At this level, management was concerned about response bias; were the ratings of those responding to the survey truly representative of everyone else?

- Length of the survey. With a different format, would respondents accept a larger number of questions that might provide more specific guidance to the Group regarding satisfaction issues?

Ultimately, management wanted a survey format that would accomplish the following:

1. Improve the response rate to acceptable levels.

2. Be minimally intrusive and burdensome on respondents.

3. Capture diagnostic information on issues that the survey might identify.

4. Provide information on a timely basis.

5. Allow flexibility in data gathering, to accommodate the rules of federal procurement.

6. Ensure continued buy-in to data collection and results by management and field personnel.

Let's discuss each of these issues in turn.

Response bias: mail versus phone

The Unisys U.S. Federal Government Group considered and ultimately moved to a telephone medium for data collection. This change had two immediate results:

- First, the response rate for the survey increased.

While honoraria are occasionally used in commercial research to boost response rates, this is not viable with federal respondents, given federal rules about acceptance of gifts from vendors.

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The change in media allowed us to boost the response rate without this device.

- Second, while customer ratings remain good, average ratings actually declined slightly with the expansion of the response base. Managers whose compensation was affected by this change were not terribly pleased. However, ultimately it was accepted that the larger response base provided a more realistic assessment of customer attitudes and experiences than achieved with the mail questionnaires.

Analysis indicates that the change in average scores was tied to increased participation in the survey and unrelated to survey media. This also validated Unisys concern about the sample being representative.

Reducing burden on respondents: multiple data collection media

The next step toward improving response rates was to allow respondents a choice of how to complete the survey. Some respondents simply don't have time for phone interviews, or are uncomfortable with the phone format. Under the multiple media approach:

- Targeted respondents receive a letter at the beginning of each field period reminding them about the survey, and requesting their cooperation. This letter is sent on Unisys letterhead and over the signature of a senior executive.

- Within the letter, respondents are told to expect a call from an ICR interviewer working on behalf of the Unisys U.S. Federal Government Group. If they wish, they can complete a Web version of the survey, and avoid the call.

Management has received comments from various agencies thanking them for making this Web option available. Some respondents prefer to see questions, while others like flexibility as to when they take the time to do it. Historically, about 20 percent of targeted respondents use the Web option.

From a methodological standpoint, the combination of phone and Web interviewing works because:

1. There is no impact on the representativeness of the data. The Web respondents are part of the phone sample; anyone not completing the survey on the Web (including those only completing a portion of the interview) are

contacted by phone. This is not a Web broadcast methodology. Respondent access to the Web survey is carefully monitored; each respondent receives a unique password, so that we can track who accesses the Web questionnaire, and how much of the survey they complete. However, the relatively low rate of use of the Web option suggests that we would not be able to achieve a representative sample using only Web interviewing, even though all of our targeted respondents are Web users. Phone remains an integral element of data collection.

2. Use of multiple media is facilitated by complementary software for Web and phone interviewing. There are several interviewing systems in the market that have both phone and Web modules, and which store data in identical structures, allowing data to be combined readily for analysis.

3. There is no evidence of any bias in rating scores between interviews completed by phone and on the Web. Of course, we are not asking unaided awareness questions, which are affect-

ed by choice of media. What we do find, however, is that open-ended responses tend to be truncated on the Web; respondents tend to type less than they would say orally to an interviewer. This truncation sometimes leads us to callbacks to clarify responses.

4. On the positive side, the diversion of interviews from the phone to the Web serves to reduce the cost of data collection, for both ICR and Unisys.

5. Finally, and perhaps most importantly, respondents like having the option of how to participate, and have told us about it.

ICR receives occasional requests for mail or fax versions of the survey. We honor these requests, although we do not advertise this option to respondents. In practice, we have found that most requests for mail versions of surveys (in this and in business decision-maker surveys) do not result in completed interviews, and we have to follow up with these respondents by phone. Where we do receive completed mail forms, we compare these results to surveys previously completed by the same

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respondent, and to data from other respondents in the same agency, to check for possible discrepancies resulting from the mail format. To date, we have not seen any results suggesting a format-based bias.

Capturing diagnostic information

Conversion of the survey from mail to the phone/web format allowed us to increase the number of questions in the interview, and to add selected probing open-ended questions. This change has allowed management to obtain infor-

mation on a wider array of issues that could potentially impact customer satisfaction and working relationships.

Open-ended questions actually contribute to data collection. Rating scores may mask concerns with issues that are only tangentially related to the question being asked. A judiciously placed open-end allows the respondent the opportunity to explain an answer that may not quite fit the question, but reflects something important that the respondent wants to communicate.

In analysis, we of course conduct the relatively standard key driver analysis on quantitative data. However, we also list verbatim responses to open-ended questions by respondent, and scan those. The purpose of reading verbatims by respondent is to understand the "story" that the customer is trying to convey in the interview, and look for patterns of responses that might indicate additional issues of concern to multiple customers.

The emphasis placed on open-ends impacts interviewer training and even the assignment of interviewers to this study by ICR. If we are to capture meaningful and detailed information, it is essential that interviewers have a baseline understanding of the Unisys U.S. Federal Government Group organization, products, services, and solutions in order for them to understand what customers say to them, and record this information accurately. We ensure this

through providing training to interviewers that includes briefing materials on company offerings, and by having the same interviewers and supervisors work on this study each quarter.

Providing timely information

Information on customer attitudes needs to be disseminated quickly to the managers who can take appropriate actions. This means:

- Issues requiring immediate action are identified during fieldwork, and this information is expedited to the attention of the research team and the client. This is standard "action item reporting." However, for this to be done successfully,

- Interviewers have to be trained to recognize what these items are;

- A report format and procedure has to be in place to take this information from the phone room to the research team.

- The research team needs to understand the amount of detail the client requires for action, and to ensure that the action report contains this required information.

- The client should have a central clearinghouse for those reports, which can direct the report to the appropriate manager for action. The function should include follow-up to ensure that actions are taken on a timely basis, and that the customer is satisfied to the extent possible with the response.

It is not unusual for customers who



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Attribute 3	4.31	4.34	4.41	4.57	4.25	
Attribute 4	4.34	4.38	4.50	4.58	4.19	
Attribute 5	4.38	4.11	4.37	4.45	4.33	
Attribute 6	4.37	4.37	4.28	4.20	4.46	
Attribute 7	4.37	4.38	4.45	4.35	4.33	
Attribute 8	4.38	4.38	4.00	4.33	4.50	
Attribute 9	4.38	4.38	4.38	4.19	4.43	
Attribute 10	4.38	4.38	4.52	4.18	4.38	
Attribute 11	4.38	4.38	4.57	4.40	4.22	
Attribute 12	4.38	4.41	4.63	4.43	4.35	
Attribute 20	4.42	4.42	4.40	4.40	4.50	
Attribute 25	4.45	4.43	4.46	4.13	4.54	
Attribute 26	4.48	4.48	4.45	4.35	4.53	
Attribute 31	4.47	4.52	4.68	4.47	4.43	
Attribute 32	4.49	4.48	4.37	4.44	4.40	
Attribute 33	4.51	4.50	4.48	4.44	4.53	
Attribute 34	4.52	4.51	4.46	4.41	4.54	
Attribute 35	4.57	4.59	4.67	4.41	4.67	
Attribute 36	4.62	4.62	4.60	4.43	4.58	
Attribute 37	4.63	4.64	4.57	4.47	4.64	
Attribute 38	4.70	4.70	4.58	4.50	4.62	

have had problems to be more satisfied than those who have not, if the customer is pleased by the timeliness and effort put into the response!

- The format for providing both action reports and other survey information has to be one which line managers (non-researchers) can grasp readily and use.

For standard survey reporting, Unisys U.S. Federal Government Group has gone to a color-coded spreadsheet format, an example of which is shown on the facing page. We've defined target levels of satisfaction (on the five-point rating scale that we use), as well as acceptable and unacceptable scores in terms of five colors. For any account or group of accounts, managers easily can see what needs improvement.

Note that the five-point scoring system is not ICR's preference. It was grandfathered into the program from the firm handling the mail survey, and it's what managers are familiar with.

We've moved the measurement program from a once-per-year inquiry to quarterly interviewing. Quarterly contact with customers:

- allows us to detect issues in some cases faster than we would on an annual interview schedule, and

- makes it easier for managers to do the internal follow up on issues, by having fewer accounts to deal with at any one time.

We limit interviews with any one respondent to once per year. Since we are in touch with multiple respondents from each agency, we try to ensure that each agency is represented in every wave of interviewing.

We use a moving average method of reporting aggregate performance results. The small number of customers means that the inclusion or exclusion of a specific agency in any one quarter can have a dramatic impact on aggregate results; use of multi-quarter moving averages circumvents this problem.

Flexible data collection

During procurement decision-making, there is a formal "blackout period" in which contacts between vendors and decision-makers are very tightly controlled. A survey contact during a blackout period could be seen as an attempt in some way to influence the procurement decision, and is not permissible.

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Thus it is essential to be able to schedule data collection around these periods. However, it is not necessarily possible to predict in advance when these black-outs will occur.

Each quarter, we review with the field the agencies to be contacted in that wave of interviewing. We ask the field to identify procurement activity; respondents from these agencies then are deferred to a later wave of interviewing that will not conflict with the procurement.

Management and field buy-in into the measurement process

Utilization, not methodology, is the ultimate measure of the value of any research effort. For this program to be successful, it is essential that managers use the results, and that field personnel accept and act on the findings of the research.

We ensure acceptance and utilization of the results of this program through the following steps:

- We meet individually with senior managers to review the content of the questionnaire and obtain their comments at the beginning of each year. While most questions remain the same, it is essential that the survey stay current with management thinking and with new technologies, so we allow some change in content each year. Managers are busy; the best way to ensure a thoughtful review of the content is to schedule a time to talk with them about it on a face-to-face basis.

- Unisys U.S. Federal Government Group leadership is personally committed to the satisfaction measurement program, and holds managers accountable for specific plans to improve issues identified in the research. We hold an annual review of the program, in which the Unisys U.S. Federal Government Group and ICR research team present a 12-month roll-up of research results to the senior management team. Following the presentation of findings, this meeting includes an immediate discussion of actions to be taken by each organization leader.

- Management uses data from the program as input into the compensation plan.

- Program managers validate whom

we interview in each agency before we conduct the survey each quarter. This list goes through several reviews, to ensure that it is accurate, comprehensive, and unbiased. It is essential that the survey interview be administered with the appropriate respondents within the agency; based on experience, we cannot be sure this will be true using a blind screening process. If vendor management has input into what is asked, and the field validates who is asked, then it is difficult to argue with the results.

Is there a risk in having the field influence who responds to the survey? Certainly. However, as we are interviewing the same agencies and in many cases the same people every year, the satisfaction measurement program team will notice omissions and take appropriate action to explain or correct them. This is possible because of the limited size of the target population.

Consistent with asking the field for input about respondents, we do not allow interviewers to pursue referrals if a particular respondent is no longer appropriate at the time the interview is conducted. In these cases, the respondent information is referred back to the field personnel for correction, and the respondent is deferred to a later wave of interviewing.

Where do we go from here?

Our continuing concern is enhancing the involvement of customers with the satisfaction program. Customers need to see the program as a valuable way to improve their relationship with a vendor, and gain better service from the vendor. We see the issue of involvement as essential to maintaining an adequate response rate for the survey over the long term, and also as essential to maintaining the quality and level of detail of the information the survey produces.

One way to nurture involvement by customers is to ensure that the satisfaction program involves the two-way communication of information. It's essential for customers to know that the information they are contributing is being used; the only way they know this is if we tell them. **74**

¹Office Of Federal Procurement Policy, "Acquisition Best Practices," Interim edition (May 1995).

Names of Note

continued from p. 10

dent. He had been at the firm's Minneapolis location. **Kathy Bieker** has joined Sorensen Associates' client services team as a project director in the Minneapolis office. **Carol Reynolds** has been promoted to quality officer in Portland.

Plano, Texas-based *JCPenney* has named **Mike Itashiki** Internet marketing research manager.

Gary Culpepper has been named operations director at *First Market Research*, Austin, Texas.

Julie Fontaine joined *Advantis Research & Consulting*, St. Paul, as director of marketing.

Carole Schmidt has been promoted to vice president of *Doyle Research Associates, Inc.*, Chicago.

Patrick Johnston has joined *Harris Interactive* as team leader/senior statistical programmer in the firm's new

Chicago office.

Digital Idea, a new Internet consulting firm based in Westport, Conn., has named **Lisa Jaccoma** managing director, brand and marketing consulting. **Lisa Langley**, director, business development, has joined to build the firm's Silicon Valley presence.

Boston-based *Uno Restaurant Corporation* has named **M. Heyward Whetsell, Jr.** senior vice president of marketing. His responsibilities will include marketing research.

Wayne Smith has been named senior vice president of services at *SPSS*, Chicago.

Boston-based *Welch's* has promoted **Peter Martin** to vice president, marketing. In his new role, Martin will be responsible for all aspects of Welch's domestic marketing programs including advertising, corporate communications and marketing research.

New York-based *Y&R Inc.* has announced that its *Brand Futures Group*

has been restructured as a new line of business under the name *The Intelligence Factory*. It will continue to be run by **Ira Matathia**, CEO, and **Marian Salzman**, president, and will count Y&R Advertising among its clients.

InterSurvey has hired **Jean Durall** to work at its Menlo Park, Calif., headquarters. In addition, **A. Michael Spence**, former dean and current faculty member of the Stanford University Graduate School of Business, has joined the company's board of directors. And **Catherine S. Edwards** has been named vice president of marketing.

Vincent Stolo has joined Boston-based research firm *Focus On Boston* as a consultant.

Louise Rehling has resigned her position as executive vice president of product development at *SPSS*, Chicago.

NetValue, a Hong Kong firm measuring Internet usage, has appointed **Darlene Lee** as Asia president and CEO to expand its services to the region. The company aims to set up Internet research



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business in China, Hong Kong, Taiwan, Singapore and Korea before the end of the year.

Mary Wang, account manager at SPSS MR, Chicago, has been named director-at-large of the Marketing Research Association's New York/New England chapter board of directors. Separately, SPSS MR has named **Patrick Quigley** senior director for the Americas.

Braintree, Mass., research firm *Perseus Development Corporation* has named **Bob Kazarian**, **Jack Brown**, and **Jack Boyles** to its senior management team.

ACNielsen U.S., Schaumburg, Ill., has named **Tim Callahan** executive vice president client service.

Vancouver-based advertising firm *Advertain On-Line Inc.* has named **Wayne Kondruk** director of market research.

New York-based *Arbitron Company* has appointed **Brad Bedford** vice president of sales for Arbitron's InfoStream

Webcast audience ratings service.

David Sackman, president and chief executive officer of *Lieberman Research Worldwide*, has joined the board of directors of BidVantage Inc., a Camarillo, Calif., online electronics marketer.

Minneapolis-based *RocketChips, Inc.*, an integrated chip maker, has named **Tim Bradow** strategic marketing manager. Market research will be among his responsibilities.

Christine Miller will join the senior management team of Discovery.com, the Web presence of the *Discovery TV* network, as executive vice president and chief marketing officer. Part of her responsibilities include direction of marketing research efforts.

Jerry R. Mitchell has resigned his position as chairman and director, president and CEO of *ClinTrials Research*, Research Triangle Park, N.C. **Paul J. Ottaviano**, the firm's COO, will replace Mitchell as president and CEO. Director **Ed Nelson** will assume the role of chairman.

Jeff Staadt has been tapped as managing director for *Stratcom*, a Massapequa, N.Y., market intelligence firm.

DeepCanyon, a Seattle online provider of business decision-support tools, information and research, has named **Yolanda Chao** vice president of engineering and **Peggy Sue Heath** vice president of strategy and business development.

Frank Quirk, chairman and CEO of *ORC Macro*, has been elected to the board of directors of Opinion Research Corporation, Princeton, N.J. ORC Macro is a global social research firm acquired by Opinion Research Corporation in May 1999.

FreeSamples.com, a San Francisco firm offering product samples over the Internet, has named **Craig Logan** vice president of operations and **Lawrence J. Becker** vice president of research technology and support.

Mary Ann Pacocha, director of Connecticut *InFocus*, Glastonbury, Conn., has been elected to the board of the New England chapter of the Marketing Research Association. She will serve as director-at-large, Connecticut representative.

Gregory Kohs has been promoted to vice president, client services, at *ICR*, a Media, Pa., research firm.

Brenda McFarland has joined *Taylor Nelson Sofres Intersearch* in the research firm's White Plains, N.Y., office as senior vice president, director.

Bill Thiel has been promoted to director of information technology at *Eagle Research*, Atlanta. In the Denver office of Eagle Research, **David Clark** has been promoted to quantitative manager and **Kimberly Whitten** has been named office manager.

The NPD Group, Port Washington, N.Y., has named **Diane Nicholson** vice president of the fashion team; **Michele Schmal** vice president of client service for the NPD Foodservice Information Group; **Anna Scott** vice president of NPD's toys, sports and foodservice tracking business in the U.K.; and **John Stebbins** vice president and managing director of NPD Japan.

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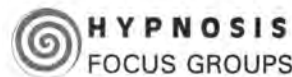


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(See advertisement on p. 25)

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More thoughts on sample size

In his fine, detailed article "How large did you say the sample has to be?" (*Quirk's*, June 2000, p. 16) Don Minchow writes that "there are probably statisticians...who will find something about this approach to criticize," and then that "clients are less concerned about subtle distinctions...between various statistical approaches, and are more interested in answering their business questions."

He is right on both counts, with one caveat: the criticism I have in mind is not a "subtle distinction between statistical approaches," but a criticism of the client's business question. Not that the client is to blame for that: it is the statistician's responsibility to alert his client to the fact that his question is incomplete, from a very practical point of view. It deals entirely with what statisticians call Type I error, and never deals with Type II error, even though both are equally important.

Type I error is familiar. It is the error of mistaking a purely random difference for a real one, and Minchow's article does a good job of demonstrating how it is addressed by the standard significance test. Type II error is the reverse, mistaking a real difference for a random one. When Type II error is ignored, the risk incurred is opportunity loss: the new product is really better, but our sample results don't indicate an advantage that is statistically significant at the desired confidence level.

That is likely to be the case when the real advantage is very small. In order to address a Type II error in a practical way, the client has to specify how small an advantage is "real" for practical, commercial purposes. That means he has to "call the shots," and that is one of the reasons Type II error is so widely ignored. The other reason is that the concept is inherently less simple than Type I error; also, the look-up tables available are not as convenient. Suppose Minchow's client decides that a difference of 0.10 has practical value, in other words, if the new lens coating is that much better than the old in terms of visual acuity, it is worth going ahead with it. If we still use the original estimate of .33 for the standard deviation of the mean, all we need to know is the client's risk tolerance with respect to opportunity loss: How sure does he want to be that, if the new coating really is better by 0.10, his sample result will test out as being significantly better at a specified confidence level?

There is the conceptual complexity of Type II error analysis, also called statistical power analysis. The client has to provide three judgments:

- 1) What is the minimum meaningful improvement (in statistical terminology, the effect size)?
- 2) How powerful does he want the test to be in terms of revealing that the effect size has been achieved (in statistical terms, the statistical power)?
- 3) What statistical confidence level does he want to use to accept that the effect size has been achieved?

Judgments as to both the statistical power and the confidence level tend to be made rather casually, ignoring the fact that (for instance) use of 90-percent criteria vs. 95-percent imply a doubling of risk from 5 percent to 10 percent. If Minchow's client chooses a 90-percent level for statistical power, and a 95-percent level for the significance test, he will need samples of 390. If greater worry about opportunity loss requires 95-percent statistical power, the sample size requirement rises to 480. For 99-percent power he needs 680.

Descriptions and tables for statistical-power computation are found in Jacob Cohen's *Statistical Power Analysis for the Behavioral Sciences* (Academic Press).

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Englewood Cliffs, NJ

An open letter to the research industry

Since the advent of online marketing research, a dialog has gone back and forth as to the merits and shortcomings of both online and offline marketing research. Which is better? The discussion typically asks for winners and losers with no meeting in the middle.

A new marketing research organization has been formed called the Interactive Marketing Research Organization (IMRO). IMRO was designed exclusively for the online marketing research groups — a safe haven, if you will, from the other side and their phone surveys, mall surveys and direct mail questionnaires. In my opinion, it is the assumption of IMRO that the online and offline researchers are worlds apart and much divided.

The fact is, whether online or offline, all marketing researchers come from a traditional research heritage. This is important to the question of whether or not IMRO should be supported or if the industry should focus on the Internet research policy efforts of existing organizations, such as CASRO, ARF, AMA, MRA, AAPOR, etc. The question should be approached as a serious obligation to the marketing research industry — both the offline sector where marketing researchers "grew up" and in the online sector which is the new frontier.

The formation of IMRO marks a pivotal moment in the development of the entire research industry. As online marketing researchers decide whether to accept an invitation to IMRO and possibly cut ties with existing marketing research organizations, there are a few things to consider.

These are the key questions that must be addressed prior to responding to an IMRO invitation:

- Are online marketing researchers who professionally live for Internet research capable of thriving as a "breakaway republic" or an adversarial spin-off?
- Is the inevitable transition to Internet research necessarily a zero-sum game — for one to win, must another lose? Is this a scenario where "new economy" players must replace traditional firms and organizations or in the least remain independent?
- Are the companies using traditional research putting shackles on online research?

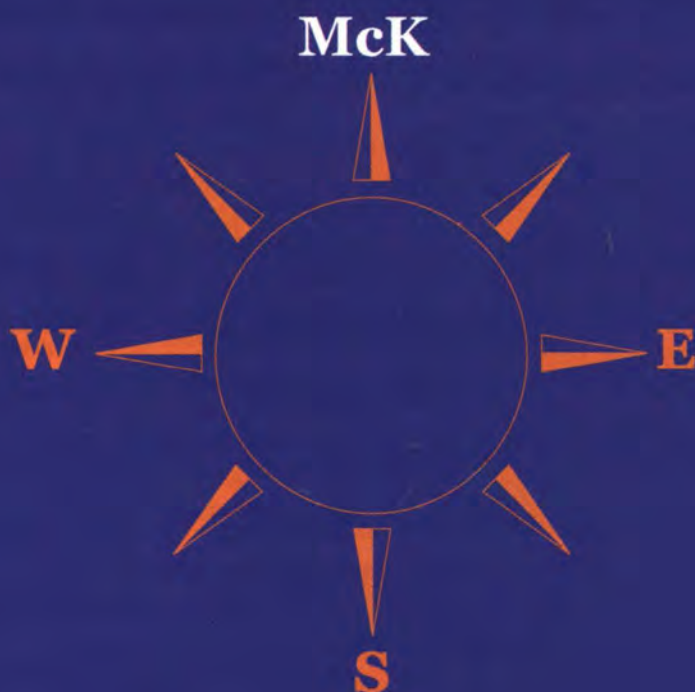
Unfortunately for the prospects of IMRO, the answer to each question is no. In truth, it's simpler than that: whether an online or offline marketing researcher, all are just trying to make a living in a time of great change. Some in the industry are creating and pushing for the change now and some are fighting for the right to change in their own time. But two facts are inescapable:

1. Even though some of us were early adopters, that does not de facto suggest we have sufficient wisdom alone to move the industry forward. Nor we are the gatekeepers.

2. The history of successful innovation teaches that it is better to assume we are painting a huge landscape and so we need all the "artists" we can find to be a part of this. Inclusive is bigger than exclusive.

Frankly, pioneers should not be satisfied until they collectively make a big difference in the marketing research industry — but, the key word is "in." Although IMRO brings well-needed policy focus on Internet research, there are compelling reasons against breaking away from existing marketing research organizations:

1. Internet research leaders will shape the marketing research industry, and bring advancement and positive change, from within and not from without. The changes brought by the Internet to our industry are so sweeping that we must think inclusively.
2. There are already too many organizations in the marketing research industry. At a time when consolidation and combining forces seems the right



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Trade Talk

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of life, are justifiably wary of further encroachment from the south. Add the Canadian dollar's slumping value and the ill health of Canada's NHL hockey teams (and the resulting threats to move the teams to U.S. cities), and you've got a recipe for a national identity crisis.

In my experience, Canadians are a gracious and good-humored lot. But I think they may be running out of patience. You can't really blame them. We Americans tend to be a pushy lot, and with our TV shows, movies, music, and consumer products streaming north, it's no wonder Canadians are feeling overrun.

And there we were, staff members of a U.S.-based marketing research magazine making a first visit to a Canadian marketing research industry event, trying to increase awareness and expand our market. But far from giving us the cold shoulder, the show-goers and organizers made us feel quite welcome.

I'm already looking forward to going back next year - assuming they haven't closed the borders by then.

* * *

While at the PMRS show I obtained a copy of a new book, *Marketing Research: State-of-the-Art Perspectives*, edited by Chuck Chakrapani. The book's stated objective is to "provide a solid and authoritative introduction by a team of experts to marketing research as it is practiced at the beginning of the third millennium."

It succeeds extremely well in doing so. Its 23 chapters are partitioned into sections on the various aspects of marketing research (gathering data, analyzing data, etc.) and each chapter focuses on a specific research task. Some examples: The always-informative Naomi Henderson of RIVA Market Research contributes a whirlwind tour through qualitative research, its past, present and future. Packaging research veteran Howard Moskowitz, president and CEO of Moskowitz Jacobs Inc. writes on product and package testing. Other chapters deal with market segmentation, inter-

national research, sampling techniques, multivariate techniques, and more.

The information here is dense and thorough (I'm still making my way through its 600-some pages... hopefully I'll finish before the fourth millennium edition hits the shelves) and makes the book a worthwhile reference.

One area the book doesn't cover in-depth is customer satisfaction research. If you're looking for a book that tackles CSR with a similarly rigorous approach, Derek Allen and Tanniru Rao of Market Probe, Inc., have written *Analysis of Customer Satisfaction Data*. While the bulk of the book naturally focuses on the data analysis, the authors have also included sections on scale selection, survey instrument design, and how to handle missing data. With chapter titles like "Causal Modeling: Multiple Dependencies in Path Analysis," the book isn't for the faint of heart (you'd best have a colleague or research supplier nearby with a background in statistics for reference). But if you need some expert insights on examining the fine points of your customer satisfaction project, this book is for you. **14**

*Marketing Research: State-of-the-Art Perspectives (666 pages) edited by Chuck Chakrapani, is published by the American Marketing Association in conjunction with the Professional Marketing Research Society. For more information call 800-AMA-1150 or visit www.ama.org/pubs/catalog/. *Analysis of Customer Satisfaction Data (245 pages, \$55), by Derek Allen and Tanniru Rao, is published by Quality Press. For more information call 800-248-1946 or visit <http://qualitypress.asq.org>.**

Corrections

In the July/August issue, two graphs accompanying the article "Track the effect of advertising better, faster, and cheaper on-line," were mislabeled. On pages 26 and 28, the vertical labels for the graphs should read: "% Recognized, Knew Who For & Liked."

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Trade Talk

By Joseph Rydholm, QMRR editor

Yo, Canada

Back in June I had the pleasure of attending the 2000 conference of Canada's Professional Marketing Research Society (PMRS) in Toronto. Along with co-workers Dan Quirk and Evan Tweed, I manned the booth at the conference's accompanying trade show and met a number of nice people. Some were readers who stopped by to say hi; some were folks who had never heard of us before and who subsequently wanted to find out just what or who a Quirk is.

It was quite a fun time. The show had a palpable feeling of enthusiasm, some of which may have been due to the fact that it was the organization's 40th birthday. (The Canadian government even declared it Marketing Research Week in Canada...but maybe they do that every year.)

The programs I sat in on were well-attended and informative, and, most importantly, the food was plentiful (especially appreciated were the mid-morning and mid-afternoon snacks, which provided needed energy boosts as meal-time caffeine doses waned).

One of the more interesting presenters was Richard Peddie, president and CEO of Maple Leaf Sports & Entertainment, who talked about the extensive use his orga-

nization makes of research, for everything from talking to Maple Leaf hockey season ticket holders and corporate partners to interviewing members of the press in an effort to improve media relations.

Jeff Swearingen, vice president of marketing, Hostess Frito-Lay Company, gave an entertaining and engaging talk about his company's efforts at managing brand equity globally using a "glocal" approach. That is, adapting advertising to deliver a common set of brand and marketing messages to a local audience. In the instance Swearingen cited, an ad campaign used a national sports hero in each country to deliver the same humorous message about the lengths to which people will go to get their favorite potato chips. The company benefited from having a strong, easily-communicated message that was readily translatable into a number of languages.

One of the recurring themes, both in the programs and in conversations at the show, was the uneasy relationship between the U.S. and Canada. Canadians, wrestling with the effects of U.S. influence on its culture, economy and way

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Non Sequitur



How to enhance
customer loyalty
and retention?

How to reach the most
profitable market
segments?

What **branding** and
pricing strategies
to adapt?

What **features** to offer?

Which **competitors** to target?

Which **positioning strategies**
to implement to gain competitive advantage?



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