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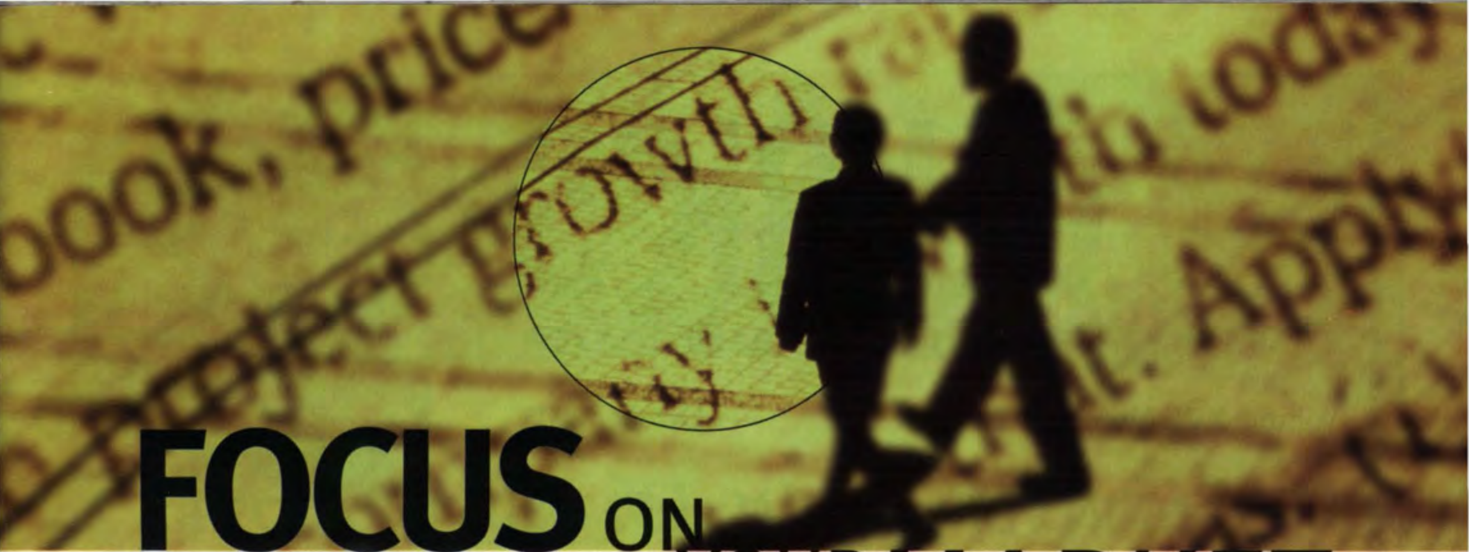

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Illustration by Jennifer Coppersmith

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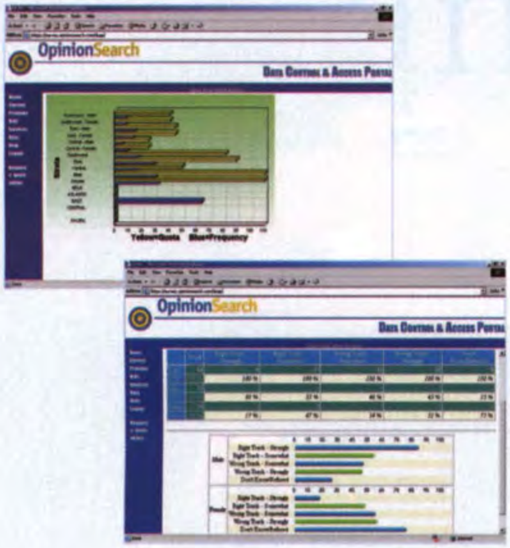

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Some bank tellers come up short

In a survey conducted by New York-based Barry Leeds and Associates, bank customers reported that many tellers and bankers did not take extra measures to assure rapport with them. Two out of three customers indicated that tellers addressed them by their name, while 78 percent indicated the

use of their name by a banker. Also, 68 percent of customers reported that the teller did not discuss any additional needs, while 53 percent said the banker did not discuss any additional needs, therefore limiting cross-sell potential.

The study reports that 96 percent of customers meeting with a teller indicated that the teller completely satisfied their needs and 94 percent stated that the teller gave them full attention. Concurrently, 94 percent of customers meeting with a banker said the banker completely satisfied their needs and 97 percent indicated that the banker gave them full attention.

Additionally, customers indicated that both bank tellers and bankers were knowledgeable, courteous and handled the transaction accurately.

When asked, "How satisfied are you overall with your bank?" 62 percent of customers indicated that they were completely satisfied. Most (84 percent) said that they are very likely to maintain their current accounts and 74 percent are very likely to recommend their bank to someone that they know.

In order to exceed customer expectations, a bank must compensate where other banks have failed. Exploring and satisfying customers' additional needs, cross-selling appropriate products, developing a closer relationship with customers and improving customer rapport are the key ingredients necessary to make a significant impact on customer satisfaction.

Barry Leeds and Associates conducted the study in June among consumers that visited a branch in the last two weeks. Consumers were selected at random and interviewed by telephone. For more information contact Paul Lubin at 212-889-5941.

No such thing as loyalty?

Customer satisfaction as a measure is a myth, says market research company Crestwood Associates following a recent survey it conducted. The survey questioned whether customers have any loyalty to merchants who satisfy their needs but offer no added or unexpected value.

Sixty-five percent of customers surveyed said they continue cross-shopping alternative vendors even if a particular vendor meets their expectations for customer service and value. Crestwood Associates' Edgar Kully contends that customer satisfaction, the much-measured benchmark of company service and likely success, has become little more than a commodity and should be considered as such by marketers.

"The absence of negatives is not a positive," Kully says, citing additional survey results that over half of consumers (56 percent) place higher value on a company that "keeps doing more and is trying to get better" than one that simply "doesn't make mistakes." That's because customer satisfaction, as a measure, doesn't really measure true satisfaction, he says.

Customer loyalty, based on satisfaction, is another myth, according to Kully, and the proof of this is that most consumers who use and carry supermarket loyalty cards have several of them — so they can shop where it's most convenient. Customers carry multiple cards to obtain discounts and promotions. They don't carry them with the belief they're being rewarded for shopping a particular store often or more frequently than other supermarkets. The myth is that the grocers believe they are rewarding loyalty. The reality is they are conditioning customer behavior by making them use cards to obtain discounts.

Results are based on telephone interviews with a randomly selected national sample of 1,657 adults, ages 18 and older, conducted in November and December 2002. For more information visit www.crestwoods.com.

Back-to-school expenditures up this year

Consumers planned a trip back to the stores before sending their children off to school this year, according to the findings of a National Retail Federation (NRF) survey. The NRF 2003 Back-to-School Consumer Intentions and Actions Survey, conducted by BIGresearch for NRF, found that families with school-aged children were planning to spend an average of $450.76 on back-to-school items, up from $441.60 in 2002. Spending for the back-to-school season was estimated to pump $14.1 billion into the economy, with kids adding another $750 million to the total.

Nearly every family with school-aged children intended to purchase clothes, shoes and school supplies this year (95 percent, on average), with almost half of consumers (45.7 percent) planning to buy electronics or computer-related equipment as well.

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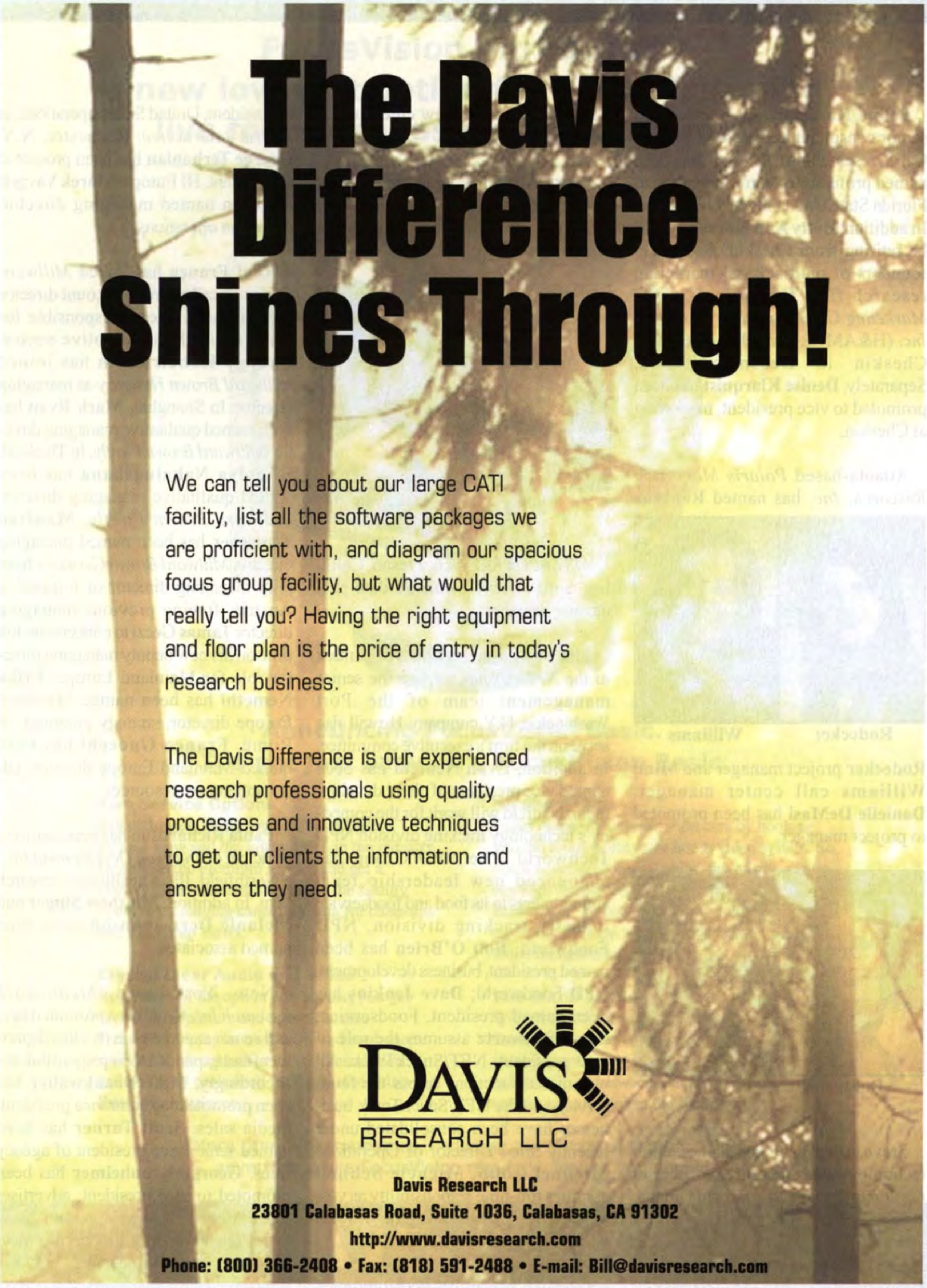

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Names of Note

Felipe Korzenny, co-founder and senior consultant at Redwood Shores, Calif., research firm *Cheskin*, has been named professor of communication at Florida State University in Tallahassee. In addition, **Betty Ann Korzenny** will be retiring from Cheskin. Both were founders of multicultural marketing research firm *Hispanic & Asian Marketing Communication Research, Inc.* (H&AMCR), which merged with Cheskin in December 1999. Separately, **Denise Klarquist** has been promoted to vice president, marketing at Cheskin.

Atlanta-based *Polaris Marketing Research, Inc.* has named **Rebecca**


Rodecker


Williams

Rodecker project manager and **Mimi Williams** call center manager. **Danielle DeMasi** has been promoted to project manager.


DeMasi


Allen

Steve Allen has been named chief technology and operations officer at *Customer Service Profiles,* an Omaha, Neb., research firm.

Market Measures/Cozint, East Hanover, N.J., has named **Barry Zimmerman** as its new chief executive officer.

Barry Allan has joined the Cancer Therapy Monitor Unit of *Isis Research*, London, where he has been named research executive.


Allan


Swanson

AIS Market Research, Fresno, Calif., has named **Steve Swanson** data processing manager.

Tim Bowles has become a consultant to the *NPD Group*, joining the senior management team of the Port Washington, N.Y. company. He will also serve on the firm's executive committee. In addition, **Evan Neufeld** has been named vice president of client development. Neufeld will work for the company's technology tracking division NPD Techworld. The NPD Group has announced new leadership team appointments to its food and foodservice industry tracking division, NPD Foodworld: **Bob O'Brien** has been named president, business development, NPD Foodworld; **Dave Jenkins** has been named president, Foodservice; **Arnie Schwartz** assumes the role of vice president, NET/SnackTrack. All operational functions across the foodservice and the NET/SnackTrack businesses have been consolidated under recently hired Director of Operations **Michael Cobb**. **Michele Schmal** assumes full-time responsibility as vice president, product management, CREST.

Gregory Novak has been promoted to president, United States operations, at *Harris Interactive*, Rochester, N.Y. **George Terhanian** has been promoted to president, HI Europe. **Marek Vaygelt** has been named managing director, European operations.

Raul França has joined *Millward Brown Brazil* as group account director and will head a team responsible for research in the automotive sector. **Gyorgy Kobelrausch** has joined *Millward Brown Hungary* as managing director. In Shanghai, **Mark Ryan** has been named qualitative managing director, *Millward Brown Firefly*. In Thailand, **Chaniya Nakalugshana** has been named qualitative managing director, *Millward Brown Firefly*. **Manfred Tautscher** has been named managing director, *Millward Brown Germany* from joint managing director of *Integral* in Austria, freeing previous managing director **Tamas Geczi** to concentrate full time on his new deputy managing director role for Mainland Europe. **Erika Nemethi** has been named Mainland Europe director, strategy planning. In Rome, **Franco Gnocchi** has been named Mainland Europe director, talent and human resources.

Paula Richardson has been named a principal of *Decision Development Inc.,* a Northfield, Ill., a health care research firm. In addition, **Matthew Singer** and **Melanie Derr-Johnson** have been named associates.

New York-based *Mediamark Research Inc.* (MRI) has promoted several senior executives in its sales department and expanded their responsibilities accordingly. **Mike Drankwalter** has been promoted to senior vice president, media sales. **Scott Turner** has been named senior vice president of agency sales. **George Kronheimer** has been promoted to vice president, advertiser sales. **Andy Arthur** moves from director of client services to vice president client services. **Anne Drake**, formerly

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New cust sat program from NetReflector

Seattle-based NetReflector, Inc. has launched a new business program called NetReflector SupportSat aimed at turning customer satisfaction into customer loyalty. The ongoing program has been designed for corporations with medium-to-large, geographically dispersed contact center infrastructures whose customer satisfaction programs are falling short of providing the actionable results. As part of the program, NetReflector integrates InstantSurvey, its online survey platform and reporting engine, with the customer's contact center or CRM application to deliver real-time customer feedback. Alongside, NetReflector's Client Services Group helps the client understand the meaning of that data by providing program design, implementation and back-end data segmentation and analysis services. For more information visit www.netreflector.com.

ACNielsen and Yahoo! team for CPG service

Schaumburg, Ill.-based ACNielsen and Yahoo! have launched Yahoo! Consumer Direct, a new service that enables consumer packaged goods (CPG) companies to reach consumers online and measure the offline sales impact of such efforts. Consumer Direct follows an "identify, communicate, evaluate" process. Members of the 61,500-household ACNielsen Homescan consumer panel have chosen to participate in the program, granting permission to allow their offline purchasing to be analyzed in conjunction with their activity on the Yahoo! network. Yahoo! and ACNielsen use learnings from the Homescan panelists to find groups with similar demonstrated interest trends among Yahoo!'s millions of monthly visitors. The Consumer Direct team then works with CPG clients to communicate to those consumers via customized online media campaigns. Lastly, the ACNielsen Homescan panel is used to evaluate the campaigns' ROI, including metrics around the impact on retail sales, brand loyalty and more. For more information visit http://acnielsen.com.

Study profiles pharma MR departments

A study by Chapel Hill, N.C. consulting firm Best Practices, LLC illustrates how leading pharmaceutical companies organize, staff, fund and focus their market research departments for maximum effectiveness. "Benchmarks for the Pharmaceutical Market Research Function" is a 33-slide presentation that reveals how seven pharmaceutical companies organize their market research departments for efficient and effective operations. Specifically, companies can learn how to best structure departments and deploy market research staff for maximum productivity. Additionally, the presentation contains: the most common funding sources for market research departments; headcount and budget figures; vital skills for market research managers; and distribution of market research employees within companies. For more information visit www3.best-in-class.com/rr114.htm.

InstantSurvey 4.3 now available

NetReflector, Inc., Seattle, has launched InstantSurvey 4.3, the latest quarterly upgrade of its online survey platform. InstantSurvey 4.3 includes advanced online survey design tools, including a new WYSIWYG HTML editor with drag-and-drop that allows users to design surveys, invitations and reports without learning HTML. The new upgrade also features enhanced reporting capabilities, such as the ability to set up report portal accounts for sharing survey data and report building internally, and a new top-box and bottom-box report for enhanced data analysis. For more information visit www.netreflector.com.

Build a message platform with MESSAGEZ

New York research firm Ziment has launched MESSAGEZ ("messages"), a proprietary method of building a message platform for a product that is most motivating to its potential customers. The system of information gathering and systematic testing is designed to produce optimal message platforms. The MESSAGEZ approach involves several phases. First, it seeks to assure that the creative process starts with the largest set of message elements available. Then it differentiates among these elements using a paired comparison technique to establish a prioritized list of message elements such as product benefits. Critical characteristics of the product messages, such as appeal, motivation, uniqueness and believability are separated out using a quantitative decision modeling technique to assess all possible message combinations. The final phase is execution testing, a qualitative measure to determine the most compelling message for the market. For more information visit www.ziment.com.

TURF module from QuestionPro

Seattle research firm QuestionPro Inc. has released its TURF module for analyzing and simulating market share, reach and coverage. Total unduplicated reach and frequency (TURF) is a statistical model that enables researchers to determine the combination of product lines or distribution channels that achieve the highest level of consumer interest or market coverage. An example of TURF analysis answers the question of how to choose three flavors of ice

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The Joy of Discovery.

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Research Industry News

Research Calendar

DTC Perspectives, Inc. will hold Achieving DTC Success on October 15-16 at the Westin Princeton Hotel, Princeton, N.J. The conference will include research findings on improving DTC creative and how pharmaceutical companies organize their DTC departments, among other topics. For more information call 973-328-9997 or visit www.dtcevents.com.

The Qualitative Research Consultants Association will hold its annual conference on October 15-18 at the Inter-Continental Hotel in New Orleans. For more information visit www.qrca.org.

SPSS MR will hold its SumIT03 conference, a global research symposium, on October 19-22 at the Delta Centre-Ville Hotel in Montreal. For more information visit www.sumit03.com.

IIR will hold its annual market research event, examining best new practices and key trends impacting the industry, on October 20-23 at the Crowne Plaza Union Square Hotel, San Francisco. For more information visit www.iirusa.com.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on retailing/category management on October 26-28 in Dublin. For more information visit www.esomar.org.

The Marketing Research Association (MRA) will hold its annual fall education conference and technology forum on November 12-14 at the Wyndham Palace, Orlando, Fla. For more information visit www.mra-net.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold a conference on qualitative research on November 5-7 in Venice. For more information visit www.esomar.org.

The European Society for Opinion and Marketing Research (ESOMAR) will hold its Global Cross-Industry Forum, subtitled "Globalization and Concentration - International Research at the Cross Road," on December 3-5 at the Eden Roc Resort & Spa in Miami. For more information visit www.esomar.org.

News notes

Austin, Texas-based **Catapult Systems** has reached an agreement to merge with BSI Consulting of Houston. The new organization will operate as Catapult Systems and will continue to provide custom application development and software integration.

The Interpublic Group of Companies, Inc. has completed the sale of its **NFO** research unit to **Taylor Nelson Sofres**. At closing, Taylor Nelson Sofres paid Interpublic approximately $400 million in cash, plus an additional payment for NFO's net cash on hand at closing, together with 11,688,218 ordinary shares of Taylor Nelson Sofres. At the closing date of July 10, these shares had an aggregate market value of approximately $35.6 million.

Interpublic has agreed to certain restrictions on the sale of the stock consideration received from Taylor Nelson Sofres until March 2004. Interpublic will also receive an additional $10 million of cash payable approximately one year after the closing date, subject to the market price per Taylor Nelson Sofres ordinary share continuing to exceed 146 pence during a specified averaging period.

As a result of the sale of NFO, Interpublic expects to realize an accounting gain in the third quarter of 2003 of approximately $100 million, subject to various closing adjustments.

Harris Interactive, Rochester, N.Y., has announced a new organizational structure designed to support continued growth, and has begun its search to strengthen its senior management team. The company has engaged an executive search firm to identify potential candidates for the position of CEO.

New York-based **Marketing Evaluations, Inc./The Q Scores Company** celebrates its 40th anniversary this year.

In September, **Gingko Acquisition Corp.** and Chicago-based **Information Resources, Inc.** (IRI) announced that Gingko has commenced a new tender offer for all the outstanding shares of IRI for $3.30 in cash for each IRI share plus a registered and tradable contingent value right (CVR), pursuant to a new definitive merger agreement. This transaction is fully financed and the tender offer has no financing conditions. The new offer was unanimously approved by IRI's board of directors. Gingko and IRI have also terminated their previous merger agreement, and Gingko has terminated its prior tender offer. The CVR entitles IRI shareholders to share in the proceeds, if any, from the antitrust suit pending against ACNielsen, The Dun & Bradstreet Corp. and IMS

International.

Acquisitions

Frank Muller has acquired company shares in **Muller Goldfarb Consultants** previously held by Goldfarb Consultants, Toronto, and has changed the Hamburg, Germany-based company's name to Muller Market Insight.

New York-based **FIND/SVP Inc.** has announced the closing of the previously announced acquisition of **Teltech**, the U.S.-based information management division of Sopheon plc, a provider of product lifecycle management software and services. The value of the transaction included an upfront purchase price of $3,050,000, funded through a combination of equity, subordinated debt and available cash, and a contingent earn-out payment of up to a maximum of $400,000. Teltech, based in Minneapolis, is a provider of custom research and information services focusing on the research and development and engineering departments of larger corporations. Teltech's revenue for the trailing 12 months ended May 31 were approximately $8.4 million and adjusted EBITDA (after confirmed cost synergies to take effect at or close to the time of closing) was approximately $1.1 million.

Nashville-based **20/20 Research, Inc.** has agreed to acquire **QualTalk.com**, a provider of online qualitative bulletin board software and consulting. QualTalk's online services will retain the QualTalk brand name and will continue to be based in Castle Rock, Colo. The administrative offices will be at the 20/20 Research headquarters in Nashville. The key QualTalk personnel will be Ted Kendall, vice president of software and consulting, and Rachael Guess, vice president of online logistics services.

Germany-based **GfK Group** has acquired a 51 percent stake in **V2**, a Blue Bell, Pa., pharmaceutical market research firm. With a staff of 59 full-time employees, the company generated sales of approximately $24.7 million in 2002. The company will trade under the name V2 GfK, LLC. The acquisition is another step in GfK's process of creating a health care division.

Millward Brown has acquired Dutch market research agency **Centrum voor Marketing Analyses**. Centrum has previously been a Millward Brown licensee. Founded in 1964, Centrum employs over 100 people full-time at its Amsterdam office. The firm will change its name to Millward Brown/Centrum. The existing structure and local management personnel of Millward Brown/Centrum will remain in place.

TNS has acquired **Data Advanced Research**, enabling TNS to extend its reach into Guatemala, El Salvador, Costa Rica, Panama, Honduras and Nicaragua. Data Advanced Research,

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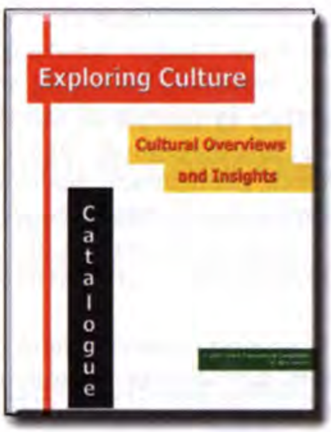

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Qualitatively Speaking

In defense of the focus group

By John J. Houlahan

Editor's note: John J. Houlahan is founder and chairman of FocusVision Worldwide, Inc., Stamford, Conn. He can be reached at jjhoulahan@focusvision.com.

Focus group research is the most widely used methodology in marketing research and increasing in usage every year. Yet in spite of demonstrated acceptance, focus groups in all their formats have lately become the most criticized and vilified form of research.

Trade reporters like to expose what "really goes on" in focus groups they have participated in or observed from behind a one-way mirror, believing they have uncovered a "big scoop" on the shabby, almost fraudulent practice of focus research. You hear speeches with titles such as "The Death of The Focus Group" from marketing consultants who find that focus groups impinge on their roles as unquestioned consumer gurus. Innovators of new services that might benefit from replacing traditional focus groups invariably start off by trash-talking about current practices.

Even those within the industry have their cautions. Well-meaning researchers acknowledge the potential benefits of focus groups but are quick to mention the "dangers." Their warnings include concerns that naïve clients may jump to conclusions, see only what agrees with their preconceived notions, and be misled or mislead others. They remind us that qualitative research is not projectable and should never be tabulated. They note that respondents can lie intentionally or unintentionally, submit to peer pressure, or be dominated by an overbearing participant in the discussion.

Sometimes qualitative research is denigrated as "quick and dirty," done only as a poor substitute for the rigor of a well-defined and well-executed quantitative project.

Despite all this, almost every marketing research budget includes qualitative research, including such industries as consumer packaged goods, pharmaceutical, financial, high-tech, entertainment, automotive and more. U.S. companies devote approximately 18 percent of their research budget to qualitative research.

The majority of focus research projects in the U.S. take place in over 750 focus facilities and are directed by over 1,000 moderators. The most common formats of qualitative research are focus groups and IDIs (individual depth interviews). Acceptance and usage has increased consistently from 110,000 focus groups and equivalent value IDI sessions in 1990 to almost double the number in 2002 of 218,000 sessions. That is a spending level of approximately $7 billion.

And focus research is a globally

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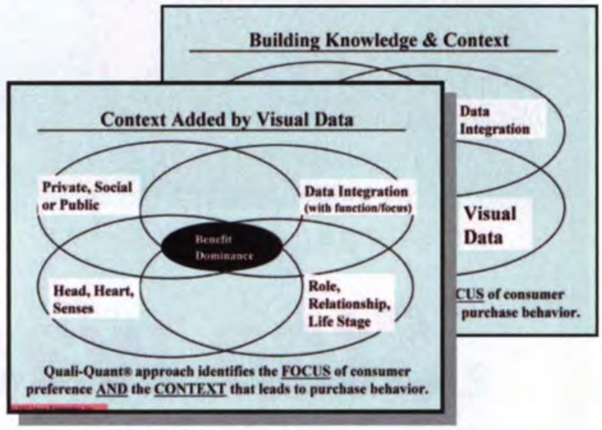

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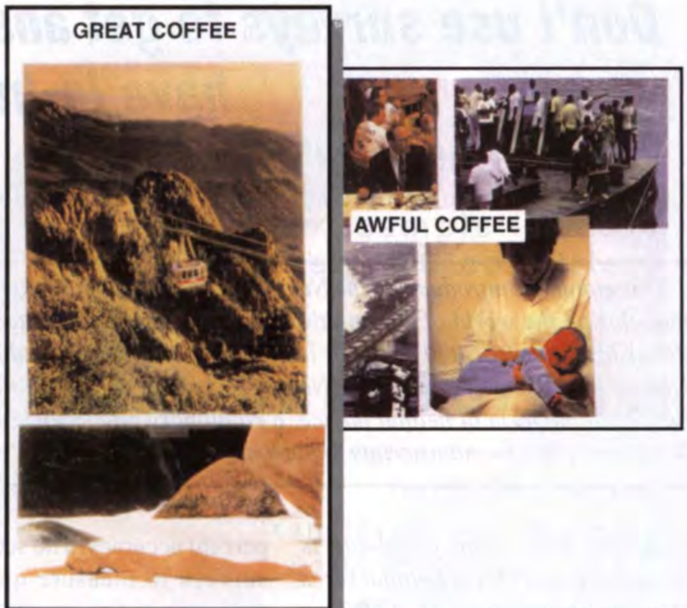

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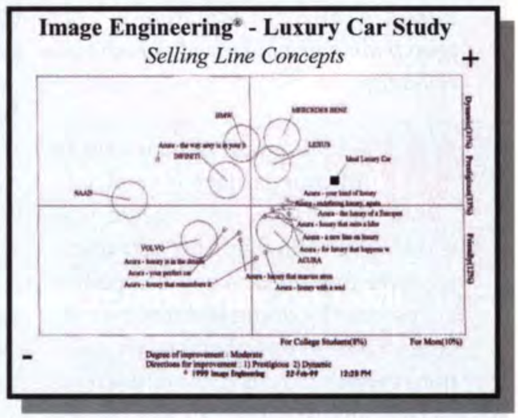

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By the Numbers

Stop wasting money!

Don't use surveys to get answers you may already have in-house

By John Goodman and David Beinhacker

This month we introduce By the Numbers, a semi-regular column in which a revolving cast of authors will offer their thoughts on the world of quantitative research. As with its sister column Qualitatively Speaking, the goal is to keep things brief (about 1,000 words or less). You won't find detailed methodological discussions here — that's what Data Use is for! Rather, we hope By the Numbers serves as a forum for exploring quant-related ideas and opinions. Whether they're in the form of helpful advice, a cautionary tale, a focused rant or a call to arms, submissions are welcome! Send your ideas or manuscripts to joe@quirks.com.

Editor's note: John Goodman is president of, and David Beinhacker is measurement manager at, TARP, an Arlington, Va., research firm. They can be reached at jgoodman@tarp.com and dbeinhacker@tarp.com.

Would you pull off the road to fill your gas tank if you could already see that needle was showing full? Probably not. However, we have found that many companies are essentially doing just that by executing surveys to gather data on questions they already have the answers to.

The opportunities for saving the company serious money lie in eliminating two areas of research. The first is measuring transactions where it is known that the process is stable and performance is very high, e.g., 98-99 percent accuracy. The second is using surveys to measure quality where there are existing internal metrics that report quality more accurately and quickly. In both situations, executing surveys is a complete waste of money!

Needle in the haystack

A major financial services company recently started to rethink its approach to measurement of customer satisfaction and quality. It found that it had 80 different ongoing transaction surveys for the full range of important customer transactions.

Of these, it found that about 30 transactions were accurately executed, meeting customer expectations at least 98 percent of the time; for some transactions, expectations were met 99.5 percent of the time. The question then is, for these transactions, is a survey the right way to measure performance? When a survey is used in a near-perfect service environment, you are basically looking for the needle in the haystack. In that scenario, 98-99.5 percent of all measurement resources are deployed in an area where there is no problem!

Relying upon a complaint-handling system offers a better approach. If the one customer out of 100 who receives faulty service is unhappy with the transaction, there is, on average, a 50 percent chance he or she will complain. Therefore, by monitoring complaints, the company can monitor the quality of the process at a greatly reduced cost. If complaints rise significantly, you have proof that something is wrong. A major hotel chain

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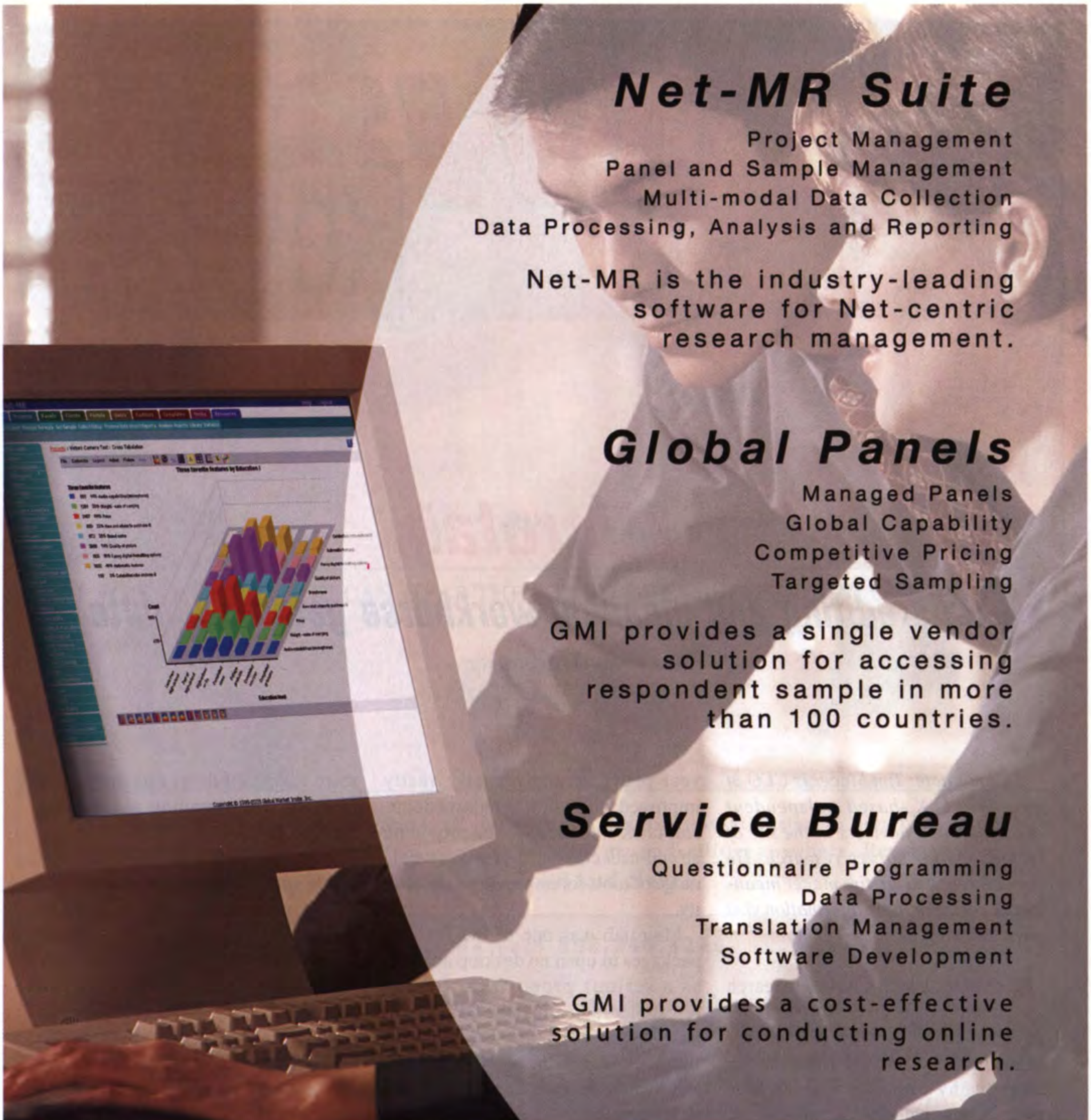

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Software Review

Microtab

Data editing and cleaning workhorse gets an update

By Tim Macer

Editor's note: Tim Macer is CEO of meaning, U.K.-based independent specialists and advisers in the use of technology for survey research. He can be reached at tim.macer.meaning.uk.com. For more information visit www.meaning.uk.com.

Anyone new to market research could be forgiven for thinking that quality is a recent discovery in the industry. Yet it is ironic that, in these quality-conscious times, so little time is now paid to that most basic quality control process: editing and cleaning the data. Most of the new generation of data collection tools pay scant regard to it. So all credit to Microtab — one of the earliest self-drive tabulation products, with a 20-year pedigree and recently vastly improved with a new Windows point-and-click interface — for providing an end-user crosstab tool with a whole range of tools for improving data quality.

Microtab was one of the first tab packages to open up desktop analysis as a serious proposition for the researcher rather than the DP specialist in-house or at the service bureau. It first appeared in the early 1980s at a time when desktop computers were new, terrifyingly expensive and still called "micros," hence the name of the product. The PCs back then were extremely limited in their resources, which encouraged great frugality among the program developers. That legacy today means that Microtab uses mere teaspoonfuls of disk space and memory while running at lightning fast speeds.

Microtab XP 2003 - Professional Edition (www.microtab.com)

Pros
- relatively easy to use
- fine control and great versatility over the content of crosstabular reports
- powerful editing, cleaning and weighting capabilities for end-users
- good import routes from SPSS or triple-s

Cons
- underlying data is still always based on 80-column cards
- lack of drag-and-drop and right-button menus makes Windows interface feel dated
- cryptic manuals with few examples

Table specs without the syntax

The product is still aimed at researchers who want to produce their own crosstabular reports, and is fairly traditional in the kinds of analysis that it produces. It assumes that you will want to produce tables in bulk. While you may spend several hours setting up the run of tables, the speed of the program means that, in most cases, the report will be ready to print in less time than it takes you to navigate the Windows dialog to send it to your printer.

It is different from many of the other desktop analytic tools, like SPSS, Quanvert or Pulsar, where you build and view one table at a time. With Microtab, you can build the whole report before you see it. That is not to say you cannot use it to build one table at a time, but it has the advantage that you can build your reports in advance

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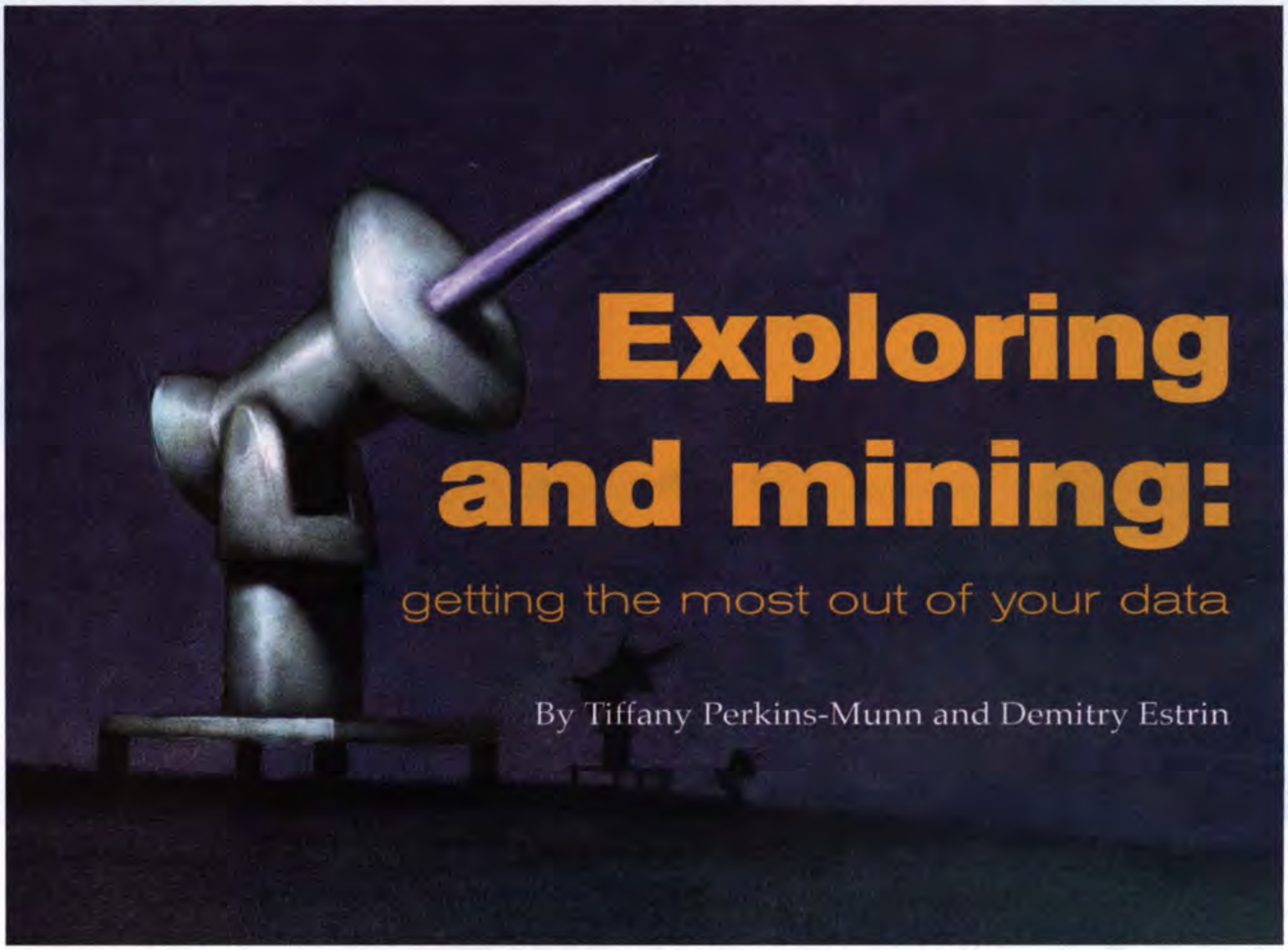

Exploring and mining:

getting the most out of your data

By Tiffany Perkins-Munn and Demitry Estrin

Editor's note: Tiffany Perkins-Munn is vice president of, and Demitry Estrin is an analyst at, Marketing Metrics, Inc., Paramus, N.J. The authors can be contacted at tperkins@marketingmetrics.com.

While it is true that many firms venture into research endeavors to find data to support their *a priori* hypotheses, often managers have no idea what to expect. To complicate matters further, within many organizations there are various camps with different agendas and surprisingly little knowledge of their client base. It is the charge of the marketing consultant to aid in interpretation, to present the findings, to prioritize deliverables to internal clients, and to plan actions based upon the results. How can we, as marketing consultants, help our clients improve their business outcomes? What techniques can we use to provide insight to our clients — the experts — about their business?

The answer is data exploration and data mining techniques. As all of our data tends to be multivariate in interpretation, exploratory data analytic techniques can identify patterns in data sets. For example, if we want to examine the relationship between client satisfaction and profitability, our survey will obviously include questions for individual consumers that can be aggregated to a higher level (e.g., all consumers who use a particular store location) and store revenue data. Multivariate analyses will allow marketing consultants to objectively model the relationship between consumer responses, variability on store satisfaction levels and increases or decreases in profitability and to uncover patterns to predict future profitability fluctuations and strategies to prevent decreases in profitability.

Additionally, using multiple data analytic techniques to explore the data can provide us with insight on the strengths, weaknesses and unique benefits of each approach. Professor W.W. Tryon, in a 1998 *American Psychologist* article ("The Inscrutable Null Hypothesis") explains, "It is difficult to estimate the handicap that widespread, incorrect and intractable use of a primary data analytic method has...but the deleterious effects are undoubtedly substantial and may be the strongest reason for adopting other data analytic methods." Although data exploration and mining techniques are essential tools for marketing consultants, their proper use and application

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Measure it,

By John Kiska

change it

Electronics retailer Future Shop embraces comprehensive service measurement program

Editor's note: John Kiska is president of AdvisorOnTrack, an Ottawa, Ontario management consulting firm. He can be reached at jkiska@advisorontrack.com.

When the largest specialty electronics retailer in the U.S. goes shopping, you can bet it looks for a good buy. Indeed, that is exactly what the Best Buy Company did several years ago when it chose to acquire Future Shop (FS), a Canadian retailer with over 100 stores and a solid reputation for offering competitive prices and product selection.

However, prior to the acquisition, Future Shop realized it was sometimes falling short in delivering the desired level of customer service. This remained the case until a strategy was put into place that included the design and implementation of an innovative customer experience measurement system.

Developing the customer service strategy

Within the consumer electronics business, the traditional belief has been that product selection and price form the key to success. And while retailers have historically professed a commitment to service, they have often failed to meet this goal.

Prior to the acquisition, Best Buy was planning to enter into the Canadian market, which would have further increased the competitive pressures faced by Future Shop. As a countermeasure, Future Shop planned to initiate a customer service strategy that would truly set it apart from the rest.

"Future Shop wanted to improve the customer experience at the store level," says Glenn Quarrington, Future Shop's senior vice president of human resources and corporate services. "We wanted our associates working equally hard at sales as well as customer service. As consumer electronics continues to increase in complexity for the average buyer, we wanted to ensure our associates were fully trained to provide product information in a helpful and professional manner."

To enhance customer service, Future Shop knew it needed to embark upon a series of system-wide changes, beginning with the development and endorsement of a customer service model by executive management. This model became the cornerstone for other changes, including a new employee recruiting system designed with greater emphasis upon testing and screening candidates for a positive attitude toward service, and a reward structure that compensated the entire store management team based on the results of customer feedback. Training programs were also revised to focus upon behaviors and skills needed to support an evolving service culture.

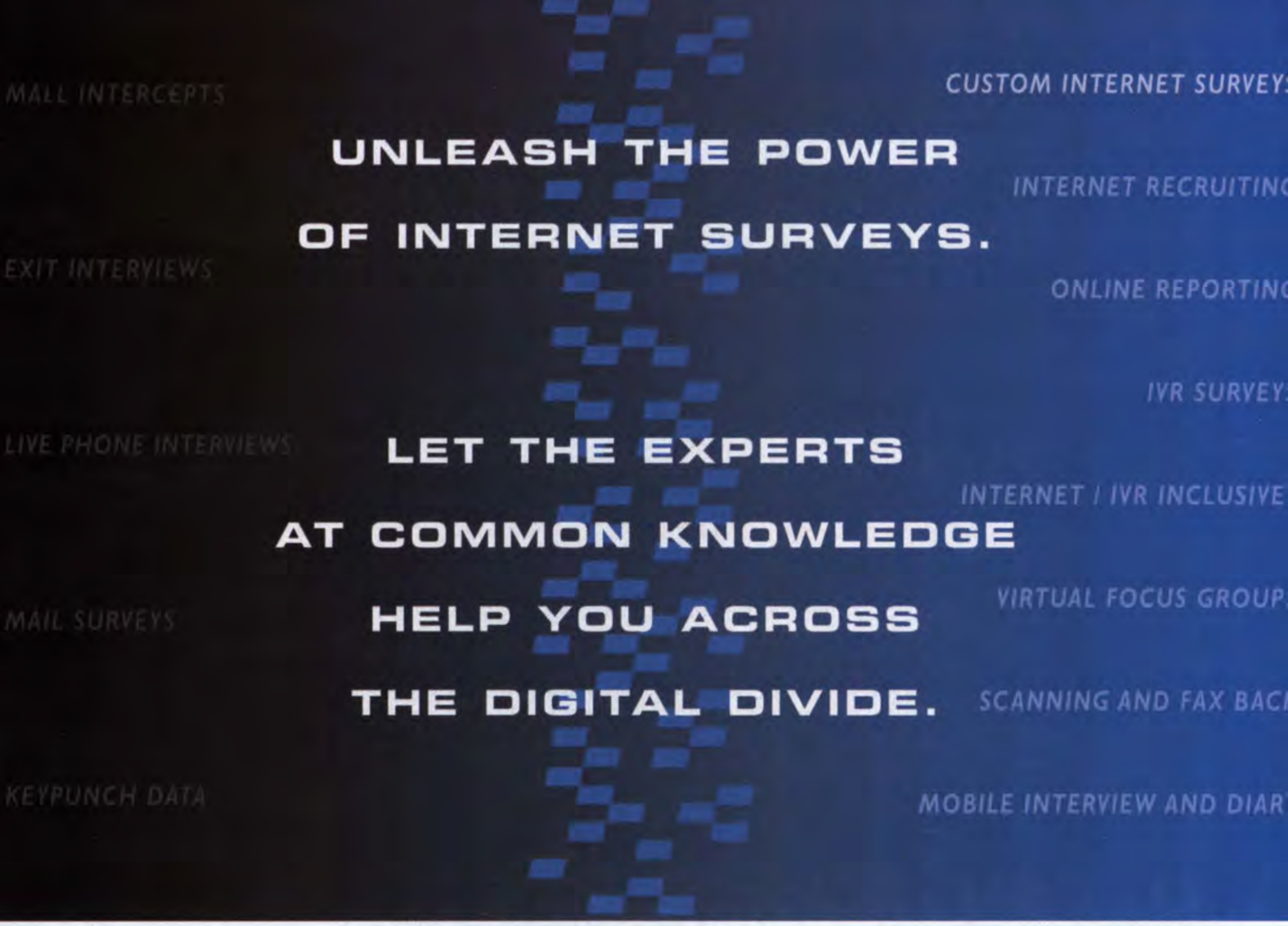
"For eligible management employees, a sizeable portion of their bonus is based on customer feedback in addition to sales and profitability performance. In developing the customer survey, we identified specific questions that are used to calculate a customer experience achievement score for bonus purposes. The better a store performs on a question, the greater the number of points that are awarded," Quarrington says.

After developing a customer service strategy, Future Shop's next step was to ensure that a system was in place to measure the in-store customer experience.

Accurate and timely

In keeping with its renewed commitment to service, Future Shop needed a measurement system that would provide it with accurate and timely information. Over the years, the retailer had tried a variety of measurement methodologies, ranging from outbound call centers to mystery shopping programs. However, these programs had limitations or proved to be unreliable. It was clear that a new system was required.

To this end, one important initial decision was the selection of a data collection technology that would help improve Future Shop's data measurement approach. Like other retailers, it recognized the benefits of collecting customer feedback in the store while customers' experiences were still top-of-mind. Also, given its reputation as a leader in consumer electronics, it was important to Future Shop that customers would perceive the data collection device as unique and



innovative.

Using these criteria as a guide, Future Shop eventually selected a portable electronic clipboard from In-Touch Survey Systems that was designed specifically as a handheld device for recording and storing responses to survey questions. In fact, Future Shop was so committed to using the e-clipboard technology that it took the unusual step of purchasing the units themselves, rather than licensing them from In-Touch. Future Shop rotates approximately 30 e-clipboards across its 110 stores on a monthly basis, using internal staff members to facilitate the data collection process.

During each month, one week is randomly designated for surveys to be completed at every store. The target is to collect a minimum of 80 responses between purchasers and shoppers alike. On a quarterly basis, the target is to collect a minimum of 240 responses. As the data is collected, stores download responses daily. A final download occurs at the end of each collection period.

The e-clipboard survey was designed to minimize the time customers spend answering questions, while at the same time maximizing the value of the information collected. This initiative required collaboration across several different departments to ensure questions were not duplicated and that the information provided value to as many different user groups as possible. To increase customer participation rates, Future Shop also began to offer an incentive for completing the survey during each quarter.

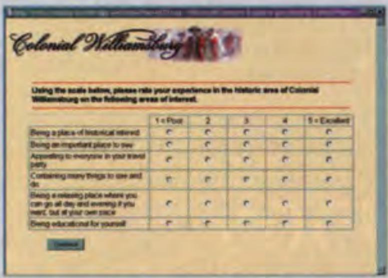
Taking action on customer feedback

As the data is collected, operational decisions affecting service are made in a real-time fashion. With data downloaded daily, store managers have access to In-Touch's Web-based, enterprise-wide analysis and reporting system. This helps Future Shop identify areas that require improvements early each quarter, particularly in those areas (or questions) that are more heavily weighted in the bonus plan.

On a formal basis, reports and statistics are generated every quarter by store, and summarized at a regional and corporate level. The scores are used to generate the Customer Experience Achievement Percentage (CEAP) that is used to determine bonus compensation.

In-Touch worked closely with Quarrington to get the weightings just right for the CEAP bonus plan. "It took some time before everyone was satisfied that the questions as weighted would produce the desired behaviors Glenn sought. But in the end the investment has paid tremendous dividends for Future Shop," says John Scott, regional vice president of In-Touch.

In addition, customer feedback information has assisted with strategic and operational decision-making throughout Future Shop. For example, the company has been able to see to



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what extent pricing, product selection and store layout influence a customer's shopping experience. Also, clipboard data that led to shopper and purchaser profiling has helped Future Shop to better understand why some people don't buy. In this instance, the information led to the pilot of new operating and staffing models to improve proficiency on merchandising tasks.

Natural progression

These developments show the natural progression of how companies use measurement programs. When a firm introduces a feedback program it is probably using it as a scorekeeping tool. But initiatives such as the Future Shop service strategy take advantage of measurement as a way to support behavioral change, Quarrington says. "We wanted our associates providing a high level of customer service. To do this we needed to hire, train, promote and reward them for a commitment to service. To ensure these changes took place, we needed a measurement system to let us know how well we were doing in meeting our customer service goals, as well as how effective we were in changing behaviors."

Now, with customer service attitudes forming part of the corporate culture, Quarrington is looking to the future. "We've collected data across 100 stores for almost two years. With this extensive data set, we want to develop models of cause and effect, to conduct what-if scenarios to determine possible outcomes on consumer behaviors. We want to develop a suite of models that we can use to make strategic decisions throughout the company. When this is accomplished, customer experience measurement systems begin to pay enormous returns."

Continued relevance

As with most things, changes must be made to ensure continued relevance. Future Shop has recently introduced a new component to the customer experience measurement program. Its cash register system was programmed to generate a survey invitation for every nth customer using a preprogrammed algorithm. These purchasers are invited by instructions on their receipts to complete a Web-based survey before leaving the store. They then become eligible for the quarterly incentive.

The goal is to increase the number of responses collected and to provide additional flexibility in the types of questions asked. "A key consideration in implementing any measurement system must be how flexible it is to change," Quarrington says.

Learning from experience

Following the Future Shop example, marketers should take note of certain fundamental lessons when designing a new measurement system.

• Make sure the methodology produces accurate data. Any company implementing a customer experience measurement system for the first time

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must begin with the basics. How will the data be collected? How many responses are needed? What questions should be asked?

Only if these fundamental questions are answered adequately will the foundation be set to collect valid and accurate information. This is an absolute minimum to ensure managers make operational decisions that will effectively improve customer service.

• Build internal consensus. Closely linked to the above is the need to build internal consensus for the program. Executive management must buy into the measurement system and be willing to make a long-term investment in it. The owner of the program must build relationships with key groups in functional areas, such as operations, sales and marketing, to ensure each group's information needs are met. Although only one group should have ultimate responsibility for the measurement program, all groups must be involved for it to succeed.

• Link information to a reward structure. Classic management theory states that what gets measured gets done. Customer feedback is no different. The results of feedback must be incorporated into a company's reward structure. This means not only linking desired performance to positive rewards, but also penalizing poor performance. All parts of the reward structure, including pay, promotions and other forms of recognition need alignment with the measurement system.

Willing to invest

In the end, Future Shop succeeded with its customer service strategy because it was willing to invest the time, money and effort to make organization-wide changes. To help it monitor its initiatives accordingly, a measurement system was implemented that provided it with customer service operational and strategic decision-making capabilities.

As for the acquisition of Future Shop by Best Buy, Future Shop still operates under its own brand name. And in combination with its sister Best Buy Canada stores they form a formidable competitive force in the Canadian retail scene.

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Editor's note: Lucy Klausner is vice president of Polaris Marketing Research, Inc., Atlanta. She can be reached at lucy@polarismr.com.

Vendors are offering it and researchers are using it, but do you need it? "It" is online reporting of research data, which can potentially provide a new look at customer satisfaction tracking data and a better way distribute it throughout your organization.

Like anything, the application needs to fit properly with your needs. Why change from something tried-and-true? What are the risks associated and what are the benefits? We have talked with three very diverse organizations to find out their views on the matter.

All three companies within the last year have converted their customer satisfaction research tracking programs to online reporting. Some concerns mentioned and addressed include: security of data; internal online and computer access; and training. Do the benefits outweigh the concerns? The researchers interviewed for this article think so.

Turning stale into fresh

Online reporting has helped breathe fresh life into a more than 12-year-old satisfaction program at Shaw Industries, a national carpet manufacturer in Dalton, Ga.

For years, Shaw Industries tracked satisfaction levels for its carpet dealers. Shaw's quality control department printed a couple hundred copies of a written quarterly report analyzing its survey data and used internal mail to distribute them to regional sales managers, relying on them to relay the information to the 1,200 sales associates. When the associates finally got the reports, the data was often months old and, of course, did not reflect the latest price changes or manufacturing advancement.

Shaw converted to online reporting as part of an overall revamping of its customer satisfaction tracking program, based on feedback from employee and customer brainstorming sessions. The new survey was designed with online reporting in mind.

With extensive access to data, both historical and current, all employees can easily view their individual results almost immediately after data collection. As expected, written reporting has changed. "The written reports we now get are more like studies than data reports. We'll ask for a special evaluation of the survey data, such as the effect of a price change or looking at satisfaction drivers for our contract business," says Chester Chaffin, director of quality control for Shaw Industries.

At this point, all of Shaw's sales crew (and most of the rest of Shaw's employees) have personal computers or laptops and regularly log into Shaw's intranet system, where the company's research data is now housed. "We sent out e-mails to the previous recipients [of the hard copy report] with a direct link to the site. It's pretty intuitive. We've had meetings with the primary users and walked them through the system. But once you've seen it, it's not hard to follow," Chaffin says.

Shaw addressed the concern about the security of its data by housing the data in the corporate quality-engineering Web site, accessible only to Shaw employees using their password-protected login information. "Everybody in the company can get to this information but you can't get to this information unless you're in the company," Chaffin says.

Weighing the possibility of competitors getting a peek at its customer measurement program against the benefits of rallying everyone around improving performance, Shaw decided it was better off distributing the information widely via the current system. "In today's world, I would probably be kidding myself to think I could keep the information from getting out to the competition in some way. Our circumstances are different from some other industries in that the entire industry is within 100 miles of Dalton," Chaffin says.

Shaw now reaps additional benefits from its redesigned customer program. *Floor Focus*, a trade magazine for the carpet industry, has ranked Shaw No. 1 for service and quality every year for the past seven years. "The big news this year is that our lead over other companies has widened," says Chaffin.

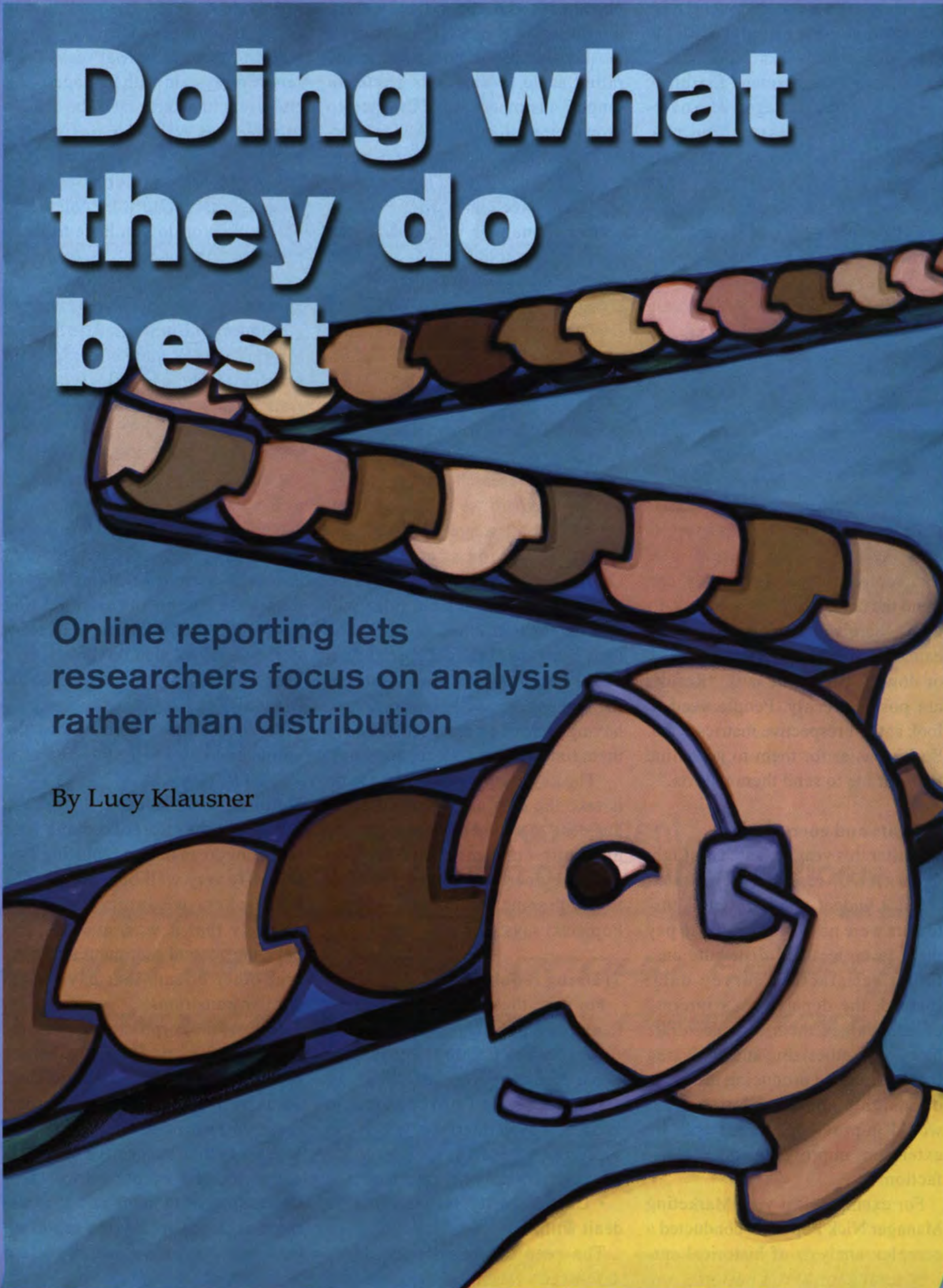
Letting researchers get back to research

The research department for Earthlink's Internet Service Provider (ISP) division used to expend huge amounts of time and energy copying and distributing customer satisfaction and retention data from its telephone survey research. Researchers spent many hours running custom reports for the various department leaders who were hoping new and creative crosstabs would help them figure out the impact of various factors on customers' decisions to sign on or leave the ISP. The special requests left little time for the researchers to conduct the advanced

Doing what they do best

Online reporting lets researchers focus on analysis rather than distribution

By Lucy Klausner



statistical analysis needed to make sense of the data on a more global basis.

That has changed, thanks to online reporting. "To a certain extent, now our internal users can play with the data, in that they can crosstab it," says Jennifer Blessman, Earthlink market research manager, who oversees Earthlink's research on new customers. "They can take one metric and try to see why it's holding at that level. Or maybe they'll want to see if people who use a particular software product are more satisfied overall.

"It's very helpful for the research department because we don't have to get involved every time there's a question. So if the stakeholders want to go on a data-digging expedition, they can do it themselves, while we work on the bigger picture."

Current online reporting was designed to anticipate these special requests. "The online reporting is easy because people can log in at their convenience. Then they can trend the data. Oftentimes, you don't know there's a problem unless you can see a blip in the data, either up or down," Blessman says. "Results are posted weekly. People need to look at their respective metrics often. So it's easier for them to go online than for me to send them reports."

Insights and correlations

Earlier this year, Atlanta Gas Light Co.'s (AGL) research department faced a budget crisis. Internal customers were no longer willing to pay them to collect and distribute customer satisfaction survey data. Instead, the department's internal clients wanted them to concentrate more on synthesizing and analyzing the data, and on producing the kinds of insights and correlations that would improve operations and, by extension, improve customer satisfaction.

For example, last year Marketing Manager Nick Popielski conducted a complex analysis of historical survey results for AGL's customer service centers. He determined that the ratings for overall satisfaction were incredibly sensitive to the length of time customers spent on the telephone with AGL. Specifically, three minutes was the cutoff point most closely tied to the mid-point in the rating scale. When calls stretched longer, customers were inclined to drop their evaluation of AGL's overall service from good to fair or poor, while shorter calls led to more very good and excellent ratings. Service center managers were delighted because they could readily apply the three-minute standard to their operation and see direct improvement in the company's customer satisfaction numbers.

Popielski realized that this was the kind of analysis his department should be doing more of, rather than spending hours compiling and disseminating research findings every quarter. "Where we add value is by taking the data we get and interpreting it — making it come alive. Online reporting permits us to do this a lot more. Our field folks will appreciate that much more in the long run than getting a spreadsheet every month. It puts the numbers at their fingers instantly without them having to wait on a report. We save them time and we save them money.

"The key thing we have time to do is take the data and use it to make business recommendations. We can help our customer satisfaction efforts by correlating this information with some of our internal data," Popielski says.

Training required

For now, the major disadvantages to online reporting appear to be:

• It requires training of managers to use results appropriately.

• Managers must also be trained to use a new Web interface, which can sometimes be difficult no matter how user-friendly the interface is.

• Data security issues must be dealt with.

The need for training should be discussed by the researcher and software supplier. Even in these tech-obsessed times, there are varying comfort levels with new technology. So be sure to choose an easy-to-use system if you plan on giving access to multiple users. It is worthwhile to conduct a trial test of the reporting system with managers and end-users to determine if the change is one that will streamline the process or make it more cumbersome. Also, consider how much training costs. Can it be conducted on the Web or do you have to incur travel costs as well?

"In order for people to benefit from online reporting, they have to be comfortable going and getting the information. As intuitive as it is, we have to take time to train. It detracts from other activities but, in the long run, it's a good investment. It's just a short-term cost," Popielski says.

Most online reporting systems are available via the Internet and supply secured user ID and password access to results. Most should provide access to various levels of secured data based upon the user ID and password. As an added level of security, access can also be limited by a user's Internet protocol, as Shaw Industries did, which then can provide access only from within the company.

Defining their value

Overall, the effort of moving your reporting to an online reporting system may very well be worth it. The researchers we interviewed felt strongly that it was, and that has been the general sentiment with several other clients that have made similar transitions.

Each of the corporate departments represented in this article are reaping benefits and further defining their value by having the time to interpret research information in a way that matters to their respective businesses. In today's corporate world of decreasing headcount and increasing workload, optimizing reporting by moving it online is definitely a welcome change.

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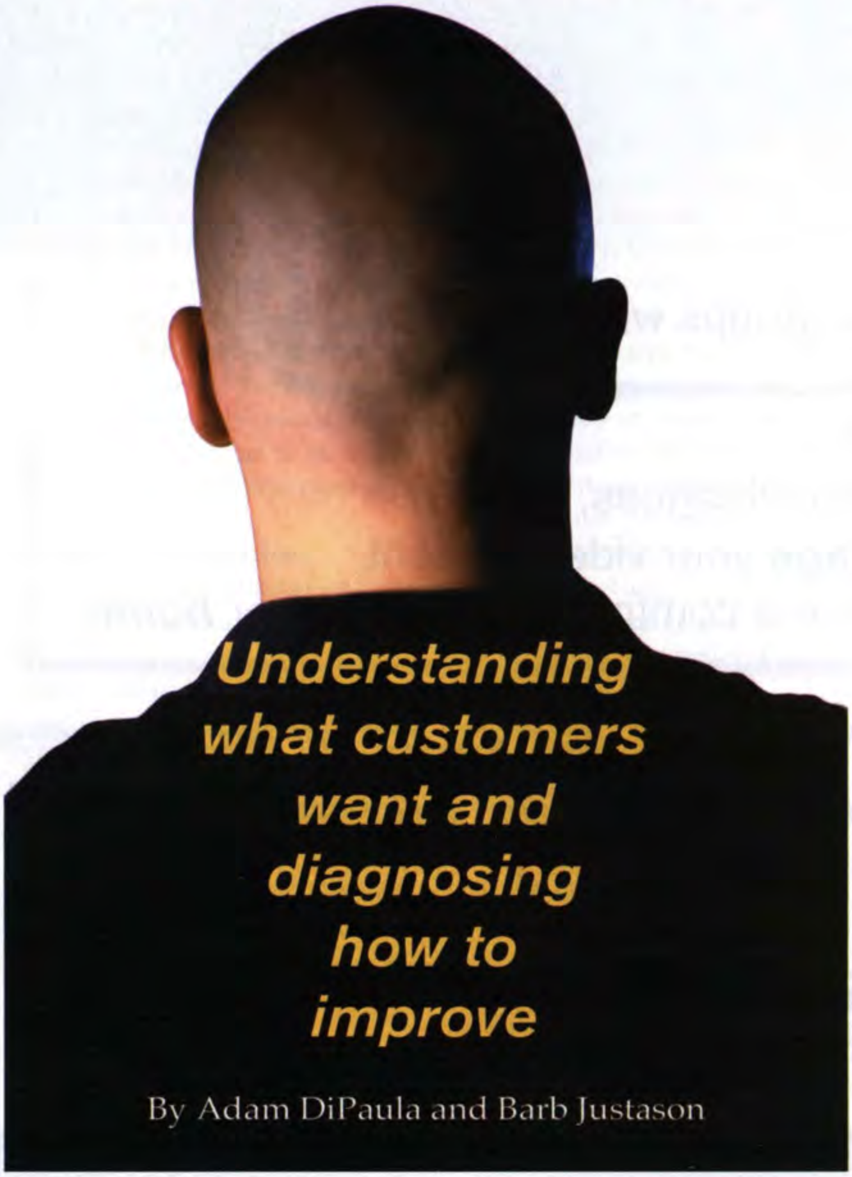
Integrating explicit and implicit approaches



Understanding what customers want and diagnosing how to improve

By Adam DiPaula and Barb Justason

Editor's note: Adam DiPaula is president of, and Barb Justason is vice president of, CGT Research International, Vancouver, B.C. They can be reached at adipaula@cgtnet.com or at bjustason@cgtnet.com.

Marketing researchers are under increasing pressure to provide practical, actionable direction in their reporting. Our clients, whether internal or external, want us to tie our work directly to revenues, staff efficiency and competitive positioning. In any other consulting profession, we might not hesitate to provide our clients with such direction based on our own experience and anecdotal evidence. And, to be fair, many of us could quite effectively provide our clients with exceptional advice to direct their decision-making. But we're marketing researchers. We thrive on evidence.

Perhaps more than any other category, clients of our customer satisfaction products are challenging us the most to provide direction that will deliver measurable results. With the assumption that a delighted customer population will reward the organization with repeat purchases and recommendations to others, these organizations want to know where they need to direct their resources to better meet the needs and desires of their customers.

As straightforward as it may seem, identifying what customers want has never been easy. Today, there is what might be best described as a frenzied obsession with identifying customer needs and desires. Organizations are throwing themselves at the mercy of their customers in their attempt to identify the elusive keys to customer retention. It is now very rare for a customer to purchase a product or service without being confronted by some request to tell the organization what they want. "We're listening," "We need to hear from you," and "How are we doing?" are all common slogans aimed at unlocking the secrets of the customer.

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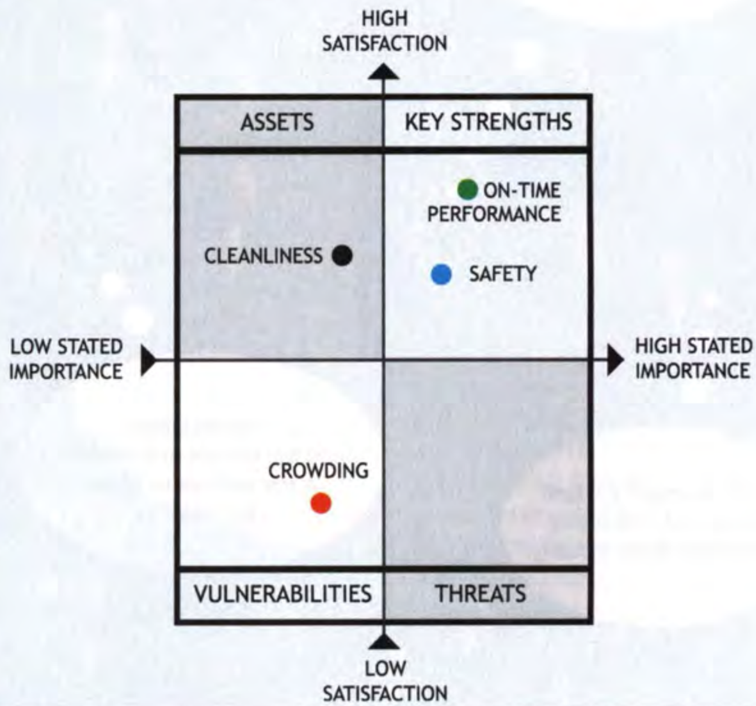
plemented these organizational mantras with techniques designed to both systematically evaluate what customers want and to diagnose what should be done to serve customers better. These techniques have involved either some type of explicit approach to understanding what customers want (e.g., asking customers to indicate what is important) or some type of implicit measure (e.g., deriving what is important to customers from other measures). Below, we briefly review some of these techniques and their evolution, and highlight how they evaluate what is important to customers, and how they diagnose what should be done to improve customer service. We then propose a way of integrating these techniques to provide a more comprehensive approach to understanding what customers want.

Figure 1 **STATED IMPORTANCE / SATISFACTION MATRICES**



Rating satisfaction with researcher-generated attributes

One approach to determine what is important to customers and how to address it involves asking customers to rate their satisfaction with various attributes of a particular service or product. The attributes rated are developed by the researcher, with the assumption that the researcher can correctly identify those attributes that are important to customers (without actually talking to customers directly). Diagnosing the appropriate focus involves simply identifying those attributes on which satisfaction ratings are poor.

• *Identifying what is important*: decided on by the researcher.

• *Diagnosing how to improve*: address attributes that are rated poorly.

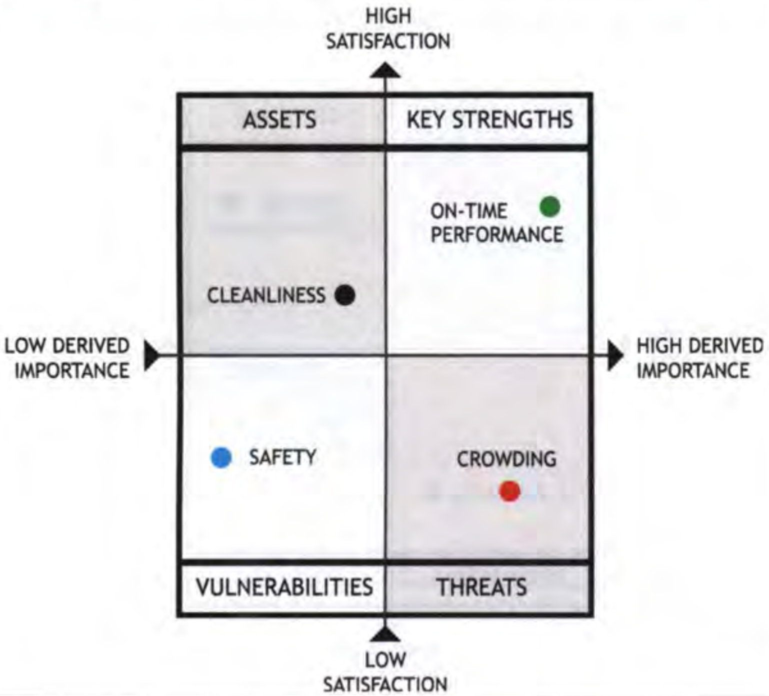
Rating satisfaction with customer-generated attributes

As researchers realized that they did not necessarily know what aspects of a product or service were most important to customers, they began to solicit feedback directly from their customers — typically in a qualitative format — to identify important attributes. These attributes then formed the basis of customer evaluation. Again, the attributes that were rated poorly were the attributes that researchers recommended focusing on.

• *Identifying what is important*: obtained through qualitative customer feedback.

• *Diagnosing how to improve*: address attributes that are rated poorly.

Figure 2 **DERIVED IMPORTANCE / SATISFACTION MATRICES**



Stated importance/satisfaction matrices

More recently, the focus has shifted toward developing more targeted approaches that prioritize service improvement initiatives, commonly by assessing the relative importance of attributes. Researchers ask customers to rate the importance of attributes and to rate their level of satisfaction with attributes. A four-quadrant matrix is created by crossing the two dimensions of importance and satisfaction (see Figure 1).

Attributes are categorized based on customer ratings on both importance and satisfaction. The researcher can identify attributes that are rated particularly important by customers and that receive relatively low performance ratings from customers — that is, attributes that customers state they value but that the organization is not delivering on (i.e., threats). These attributes can be targeted first, before those underperforming attributes that are rated as less important by customers (vulnerabilities). A key assumption of this approach is that customers can explicitly and reliably identify all of the attributes that will influence their impressions and behavior.

- *Identifying what is important*: Customers directly rate the importance of attributes.
- *Diagnosing how to improve*: Attributes are prioritized and targeted based on a combination of stated importance and satisfaction ratings.

Derived importance/satisfaction matrices

One of the shortcomings of the approach above is the often minimal variation in importance ratings across attributes — sometimes called the halo effect. Things can get fuzzy because customers tend to rate all attributes highly important. Further, stated importance measures are also subject to socially desirable responding — customers may say an attribute is important to them because there is widespread endorsement of that attribute (e.g., using products made of recycled materials), but the attribute may in fact not be truly a factor in customer choices.

So researchers have turned to measures of derived importance. Derived importance measures are calculated by correlating satisfaction ratings on individual attributes with a measure of overall satisfaction. The resulting correlation coefficient is an implicit measure of the influence of the attribute on perceptions because customers are not asked directly what is important to them.

With increasing frequency, derived measures of importance are replacing stated importance measures, and are being used to create the same type of matrix that is shown in Figure 1 (see Figure 2). The assumption is that in obviating the halo effect, derived importance measures essentially produce the same as or better diagnostic information than do stated measures. And the budget advantage is obvious: The survey instrument will be shorter by an entire battery of questions.

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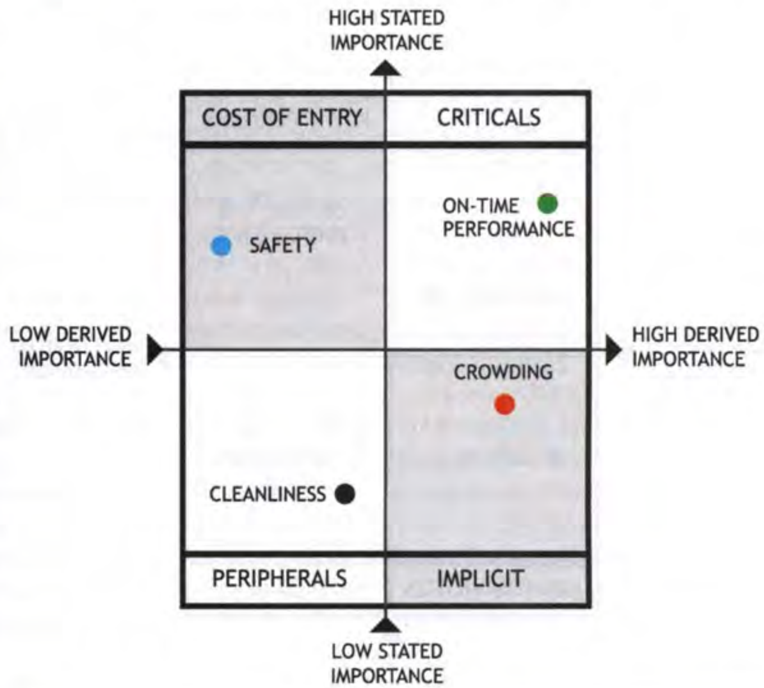
Figure 3 **STATED VS DERIVED IMPORTANCE MATRIX**



Identifying what is important: Importance is derived from the correlation between attribute satisfaction and overall satisfaction.

Diagnosing how to improve: Attributes are prioritized and targeted based on a combination of derived importance and satisfaction ratings.

An integrated approach

But perhaps we've been too quick in jumping on the derived importance bandwagon. In many instances, it is a mistake to assume that derived measures of importance will produce the same or better diagnostic information. In fact, we argue that a deeper understanding of what drives customers can be gained by examining the interaction between stated and derived measures.

We first began to understand the value of examining attributes as a function of both stated and derived importance in our customer research in the public transportation sector. We had customers rate how important particular attributes were in their decision to use public transportation (stated importance), rate how they perceived the system to be performing on each attribute, and rate their perceived performance of the system overall. These latter two ratings (performance on each attribute and overall performance) create a measure of derived importance for each attribute.

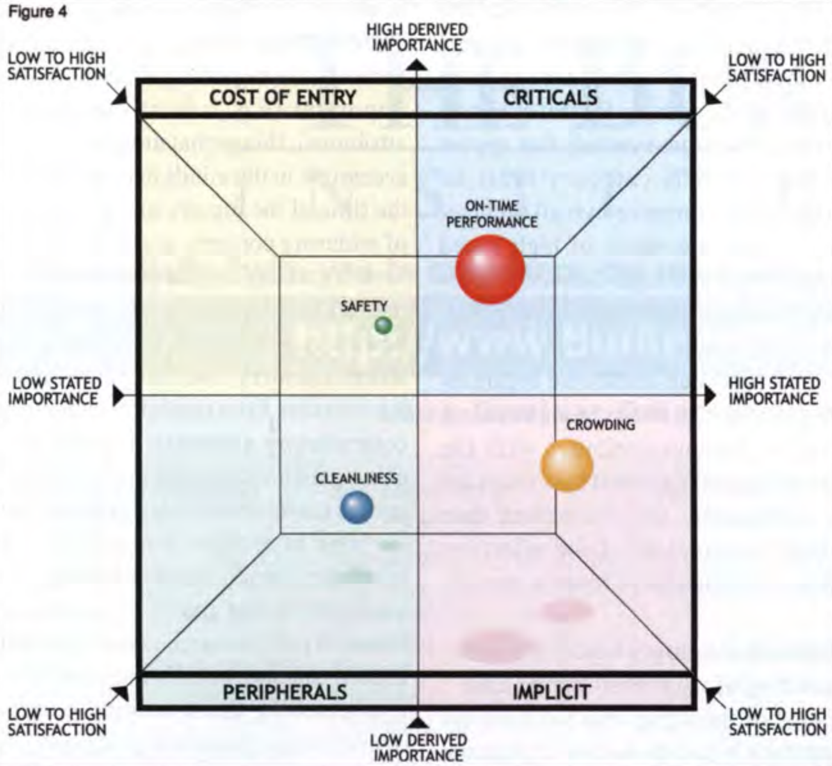
We found evidence that, rather than producing redundant measures of importance, these measures could be viewed as independent dimensions. Some attributes were high in stated importance but low in derived importance. Some were low in stated importance but high in derived importance. Some were high on both measures; some were low on both measures.

In the matrix in Figure 3, we crossed the dimensions of stated and derived importance to create four quadrants. We've labeled each quadrant and show examples of the types of attributes that fell into each quadrant in our analysis.

• Criticals. Criticals are attributes that are viewed as essential to customers for their continued use of a service or product and have a strong impact on perceptions of service or product quality. In our analysis, service frequency and service reliability emerged as criticals.

• Cost-of-entry. These are attributes that customers view as essential for the service to have in order for them to use it (they are probably often expected attributes). These attributes are looked upon as part of the cost of entering the market. Performance on these attributes, however, is not strongly tied to over-

Figure 4



all perceptions of the service or product. Feeling safe using transit services emerged as a cost-of-entry attribute in our analysis, likely because customers generally expect this attribute and it therefore does not figure substantially in the customer's overall assessment of the service.

• Implicit. Implicit attributes are those attributes that customers, when explicitly asked, indicate are relatively less important to them but nonetheless emerge as strong drivers of overall performance perceptions. Crowding emerged as such an attribute in our analysis. We believe that implicit attributes emerge because customers are not always aware at a conscious level what drives their perceptions or behavior. Customers make assumptions about what attributes are important to them, but this may not always correspond to what attributes actually affect their perceptions most strongly.

• Peripherals. Peripherals are attributes that are not rated by customers as highly important in their decision to use a product or service, and they have a relatively weak influence on overall perceptions of service product quality. Having clean, graffiti-free transit vehicles emerged as a peripheral attribute in our analysis.

We see our approach as painting a more complete picture of what is important to customers. Relying solely on

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stated measures to identify what is important to customers would mask the implicit attributes that drive customer perceptions and behavior (e.g., crowding). Relying solely on derived measures would minimize the importance of cost-of-entry attributes that clearly need to be present in order for a product or service to be used (e.g., safety).

While we developed our approach by analyzing data in the public transportation sector, it can be adapted to other sectors and industries. For example, in the insurance industry, we might find that attributes like speed or timeliness of the claims process emerge as criticals; attributes referencing personal characteristics of staff (e.g., friendliness, warmth) emerge as implicit; attributes related to payment options emerge as peripherals; and attributes related to basic aspects of the service transaction (e.g., correct calculation of relevant discounts) emerge as cost-of-entry attributes.

The next step: customer diagnostics in 3-D

We can add the diagnostic component to our approach by adding a third dimension to the matrix which incorporates the average performance rating for each attribute. We illustrate this in Figure 4 using hypothetical ratings for a set of attributes. In interpreting the matrix, note that the larger the symbol for the attribute, the lower the average performance rating is for that attribute. Hence, the larger symbols that appear in the criticals category must be addressed to improve overall satisfaction. These are issues of high stated importance and high derived importance on which an organization is performing poorly.

This approach allows the organization to prioritize efforts to improve service or product attributes with the knowledge of both what customers tell us is important and what drives their overall perceptions of the effectiveness of a particular product or service.

Toward a comprehensive understanding of what customers value

One of the things that we hope our approach highlights is how explicit and implicit methods of measuring what customers value complement each other. Explicit inquiry — asking customers directly what is important — is necessary to fully understand what customers see as the essential factors guiding their own behavior and decision-making.

However, as noted earlier, customer feedback elicited through explicit approaches is affected by factors that may not identify all of the key determinants of what customers value. These factors include, among others: assumptions regarding what should be important (e.g., socially desirable attributes), things that are particularly accessible in the minds of customers at the time of the inquiry but may not be of enduring concern, and the need for "sense making" on the part of the customer (the need to explain wants and desires in a coherent, internally consistent manner). The latter may inhibit customers from explicitly endorsing contradictory attributes; for example, placing high values both on fast service and on customer service agents taking the time to explain things fully in a warm and friendly manner. Making the assumption that much of consumer behavior (and human behavior, for that matter) can only be fully understood by understanding the seemingly contradictory motivations that give rise to it, we need a way to bypass the explicit plane of inquiry and move to the implicit.

Implicit measures of customer value are necessary because we cannot (nor should we expect to) rely solely on the customer to tell us what is important to them. Can you accurately articulate everything that drives your own choices in your daily life — your choice of mate, your brand of beer, the car you drive? Probably not. For example, a strong determinant of the extent to which someone will have a positive image of a brand is the extent to which they have been repeatedly exposed to that brand image. However, if you were asked why you have a strong view of a brand, you would likely not count "I've seen it a lot" among your reasons. Nor, if asked why you chose your mate, would you rank repeated exposure among the primary reasons driving your mate choice (although perhaps, in that case, it depends on the nature of the exposure).

Implicit measures of customer value, such as derived importance correlations, complement explicit measures by illustrating the values that customers cannot necessarily directly articulate, but nonetheless form a large part of the reason why they use a company's products and services.

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The CRM paradox

Where's the customer in customer relationship management?

By John C. Lo

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With increasing competitive pressures and high rates of customer churn, improving customer loyalty is of paramount importance to all companies, large and small, and across all sectors. Companies are realizing that customer retention is as important, if not more important, than the acquisition of new ones. Such market conditions have propelled customer relationship management (CRM) into the spotlight as a strategic imperative rather than merely a technological innovation. CRM is premised on the belief that developing a relationship with customers is the best way to gain their loyalty. Indeed, CRM not only allows marketers to offer customers products and service with an enlightened degree of confidence, but enables the sales force to collaborate on opportunities and service representatives to manage customer support requests. Yet it has been reported that as many as 70 percent of all CRM projects fail.

One suspected cause is the fact that more than half of all CRM development starts with information technologists, even though sales and marketing departments are the primary users of the CRM database. Such an approach is backwards, considering marketing and sales staffs should first determine the specific needs of the customers and relay that information to the IT department. This has led to a paradox surrounding the philosophy of CRM.

The CRM paradox

Industry writers, practitioners and even companies that have implemented CRM systems themselves claim to recognize the importance of including customer value generation as an objective for CRM. Yet what they preach often differs from what they practice. Indeed, a common mistake in CRM technology implementations is the misconception that simply having the technology in place is the answer to customer management. This approach neglects the importance of one-to-one relationship-building. For example, if you get a sense that your customers value the time interacting with a representative of the company who knows their

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names, you may not want to replace that function with software. Perhaps the banking industry is most guilty of this. Many banks now are pushing their customers toward using ATMs and even punishing those who persist in using live tellers/representatives with service fees and transaction limitations.

When it comes to the implementation of CRM systems, the sense is that customers are treated as an afterthought, and that customer service/care is merely a function of sales mandates, hence the paradox. The following quotes from leading consulting firms and/or companies that have implemented a CRM initiative seem to highlight this paradox:

• "CRM is not about the customer...the end-game is not customer-centricity, in and of itself. Businesses wishing to take the ROI guesswork out of CRM projects should start with a shareholder value perspective and the fundamental determinants of shareholder value creation: revenue growth, margin enhancement and asset productivity."

• "One of our big initiatives is driving as many customers as possible to self-service solutions."

• "For large customers, we need to optimize revenue; for smaller customers, we need to focus on reducing the cost of the service."

As evidenced in these comments, there appears to be a loss of orientation around customer service and value generation, which is surprising given the vision of customer relationship management. Adding to, or perhaps perpetuating, the confusion is the vendor hype that often leads companies into large-scale implementations and to lofty expectations about the benefits of CRM. These are the same vendors seeking to maximize product licensing while minimizing ongoing involvement with customers — another paradox given the message of "customer focus" embedded in their sales pitches.

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Case studies

In an attempt to verify this apparent paradox of CRM, 24 conveniently sampled case studies on CRM implementation were analyzed. The case studies were downloaded from popular Web sites geared around the implementation of CRM initiatives. Each CRM project was evaluated on the strategic and/or operational purposes of a proposed system (objectives) and then compared with the resulting benefits of having implemented the system (success metrics). Conventional content analysis procedures were used.

Three broad categories of CRM objectives were used to evaluate each case implementation:

1. Revenue-oriented (e.g., to promote cross-selling or upselling opportunities with customers through segmentation and targeting techniques, such as data mining and modeling).

2. Cost-oriented (e.g., to improve efficiencies of transactional processes and reduce costs — quicker, more consistent transaction times or reduce man-hours associated with each transaction).

3. Customer-oriented (e.g., to better respond to customer requests and changes in behavior with the goal of improving satisfaction through more personalized interactions to increase customer value.

Similarly, success metrics were aligned accordingly:

A. Revenue-oriented (e.g., having increased sales, revenues, growth, etc.).

B. Cost-oriented (e.g., having cut costs or reduced man-hours to process customer transactions).

C. Customer-oriented (e.g., having improved customer satisfaction or service quality).

Findings and observations

The single most obvious disparity between CRM objectives and CRM success metrics pertains to what companies tend to preach and what they most frequently practice. While companies tend often to emphasize one or more CRM objectives, success metrics from the perspective of their customers (e.g., satisfaction or service quality) are often omitted from their evaluation process. In specific, while 80 percent of the companies made mention of some form of customer value generation as an objective for their new CRM initiative, in only 13 percent of these cases do companies actually use customers' evaluations as a basis of measuring the success of the project.

For example, in one particular case study, a company implements a CRM system to increase productivity, while delivering the highest quality of customer service possible. Yet, when evaluating the success of their CRM, the company reports only boosted productivity, slashed costs and increased revenues. It is even more interesting to note that the company boasts that "the new system allowed 150 percent more contacts to customers to inform them of late or nonpayments." While it is certainly questionable how many customers actually value being told to "pay up," the larger concern is the general lack of insight gained into what aspects of the new CRM system customers actually value and whether its implementation has led to overall improvements in customer service and satisfaction.

Moreover, other companies that alluded to having created value for the customers through the CRM system were unsubstantiated and based on management's perspective on what the CRM should be able to do for the customer rather than what it has actually done.

Conversely, while less than half of companies mentioned revenue generation as an objective for the CRM, it is obvious that most companies (about 80 percent) used some sort of revenue-oriented metric to measure the success of their CRM. This may result from the need to continuously justify technology investments and be accountable for ROI.

An obvious limitation to a case study analysis approach is the limited number of CRM failures described. Typically, cases are prepared by CRM solution vendors, or in cooperation with their clients, and are used as a marketing tool to push their products. It is not surprising then that cases speak only of their success and the resulting improvements in revenues, cost reductions, process efficiency, ROI and the like.

However, the general message is clear. It would appear that many companies have a narrow concept of customer relationship management, one that equates to the collection of subscriber statistics, target marketing and customer service agents' response times. As such, the customer is little more than an object of a call center script — and rarely valued as a "market of one."

Market oriented?

While many companies think of themselves as market oriented and go to great lengths to prove themselves so with CRM technology, few actually are. Businesses need to understand that it is not technology per se that governs customer satisfaction, but rather the human side that builds the relationship between a vendor and a customer. Indeed, non-technical attributes may be more important than precise technical differences. Akin to the concept of market orientation, CRM is a business philosophy and strategy.

If CRM is to truly deliver on its promise of personalized service and product delivery, CRM implementations must begin with a customer retention strategy. Value creation hence should come from the perspective of the customer. Customers must be included in the evaluation process. Companies need to ask:

• What are the impacts of the CRM system on customer perceptions, interaction and communication?

• What value, if any, do customers perceive/achieve in their interaction with the company's automated CRM system?

• Do customers choose your brand over competitive offerings due to the benefits they perceive they derive from your CRM program?

• What impact does the CRM program have on customers' satisfaction, likelihood of recommending or advocating the company to friends and family, and reported intentions to buy the same brand again?

• Are customers convinced that a company, through its CRM initiative, has their best interests in mind and delivers to them the most relevant service and products?

As fundamental as these questions may be, they are the ones that need to be addressed and integrated into any evaluation of a CRM program. Automated processes may benefit the company, but not the customer. Ask customers what they value. You won't know for sure until you do.

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Forging links

A primer on linkage research

By Kyle Lundby and Carrie Christianson DeMay

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In today's increasingly competitive business climate, organizations are searching for low-cost but effective means to improve customer loyalty and profitability. However, determining the key drivers of loyalty and profitability remains a significant challenge for many organizations. In other words, if the goal is to improve customer loyalty and profitability, how do you determine where to focus time and energy in order to have the greatest impact? One solution is linkage research — a method that uses statistical modeling to identify relationships (i.e., identify the links) among different organizational metrics. For example, a linkage model for a retail store with locations across the United States might show how employee attitudes relate to customer attitudes (overall satisfaction, willingness to recommend, etc.) or other more tangible outcomes (return visits, share of wallet, etc.).

Linkage research can also tie employee and customer measures to bottom-line financial outcomes such as sales growth or other profitability measures. For example, the CEO of an automobile company may have a hunch that customers who interact with highly service-oriented, well-dressed and knowledgeable sales associates are more likely to purchase a vehicle than customers who interact with sales associates who have fewer of these characteristics. In linking terms, the CEO believes that the attitudes (service orientation) skills (knowledge of product) and appearance of associates at individual dealerships impacts the experience of customers (as indicated by their level of satisfaction) and their purchase decision.

Linkage researchers test these hunches by building statistical models that represent the different measures (e.g., employee attitudes and behaviors, customer attitudes and behaviors, and financials) and the strength of their interrelationships. In the car company example, linkage analyses may reveal that service orientation and associate knowledge is more important than appearance in determining customer satisfaction and their decision to pur-

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chase or not purchase a new vehicle. For organizations engaged in linkage research, the real value comes from the relationships that are identified in these models. In essence, they are roadmaps of cause and effect and suggest specific areas to target for improvement. In the car company example, emphasizing service quality and associate training should have a greater impact on customer satisfaction and sales growth than worrying about the appearance of sales associates. Thus, linkage research helps organizations determine where to focus their efforts to achieve desired outcomes. Rather than relying solely on hunches or intuition, which may be right only part of the time, decisions can be based on data and relationships between the measures that really count.

An overview of linkage research

Although there is really no one best way to conduct a linkage study, there are some fairly common steps. However, before the first step is taken, it is important to consider the following six linking-readiness factors:

1. What are the objectives of the study and what is the level of commitment within the organization? Is the objective to decrease employee turnover, improve customer satisfaction and loyalty, increase company profits, all of the above, or something completely different? As with any project, if the objectives are not fully understood, linkage research can be a time-consuming effort. Organizations also need to understand that linking research represents a different way of doing business and they must be committed to this path. For example, in many companies, employee opinion data, customer opinion data, and financials have always been collected, but not integrated. Linkage research brings these and other appropriate data together in one overall model. It also takes time and cooperation among groups who may not be accustomed to working together (e.g., finance, human resources, marketing). If a company is not prepared to integrate these different sources of information and committed to the long haul, it may not be worth expending the effort. However, if the objectives are clear and the commitment is there, the rewards of linkage research can be significant.

2. Do you have sufficient internal expertise to conduct a linkage study? Although linkage research makes sense, the statistical analyses it uses are somewhat complex and require a good understanding of statistical principles, research methods and the ability to use different analytical tools (e.g., correlation, regression, structural equations modeling). It also requires knowledge of some less common techniques such as aggregating data, combining multiple files and evaluating within-group agreement.

3. Are you familiar with the history and current best practices in linkage research? Although you don't need to be aware of every linkage study that has been published or presented, some familiarity with this line of research will be helpful. If for no other reason, it will save time and effort to know what has worked, and not worked, in the past and under what conditions.

4. How complex is your linking model likely to be? One of the first steps in any linkage study is to create a conceptual model representing your best informed guess of what causes what. The conceptual model should depict the important issues (e.g., customer attitudes, employee attitudes) and how you believe they are related to one another. Linkage models can be simple (depicting only two variables) or complex (involving many variables measuring different aspects of customer and employee attitudes over multiple points in time). Of course, as the complexity of the model increases, so does the complexity of the statistical analyses.

5. Do data exist for all of the variables in your model? If the goal is to determine which employee attitudes impact customer satisfaction, it will be necessary to have both employee and customer opinion data. In reality, organizations rarely have measures for all of the variables they would like to include. If the missing variables are "nice to haves" rather than "need to haves," they can be left out. However, if they are central features of the model, new measures will need to be created and data will need to be collected.

6. What will be your unit of analysis?

In addition to developing a conceptual model of what causes what, it is important to think about the unit of analysis that will be depicted in the model. Although most linkage studies have used locations as the unit of analysis, it is possible to use other groupings, such as functional areas, job types, geographic region, or some other meaningful unit. Considering the unit of analysis is important for several reasons:

• The unit of analysis is where actions are likely to be taken. For example, if the service orientation of personnel in an automobile dealership contributes significantly to the service and purchase experience of customers, the next step would be to identify dealerships where employee service orientation falls below some threshold and take appropriate actions within those dealerships.

• The unit is the level at which data are analyzed. A requirement of linkage research is that the data be analyzed at a common level. In the car company example, employee and customer opinions were collected from individuals but they will need to be rolled up or aggregated to the dealership level for analysis. Once chosen, this common denominator (dealership in this case) is used to tie the different sources of data together in one large data file.

• There must be a sufficient number of units to conduct the analyses. Although the lower limit depends on a number of factors (e.g., quality of data, whether datapoints exist over multiple points in time), more locations are generally preferable.

Moving forward

After considering these readiness factors and making the decision to move forward, the following seven steps are commonly carried out in a given linkage study.

1. Form a linking team — In contrast to traditional survey research programs, linkage research requires collaboration among organizational groups who may not be accustomed to working together. For example, in many organizations, employee opinion surveys are conducted by human resources while customer surveys are conducted by marketing research. Because linking uses employee and customer data, these two groups must work together. Finance is another group that may not be accustomed to working with HR or marketing from a survey research standpoint. Forming a team representing these different areas facilitates the process of building and then carrying out the research. This cross-functional team approach can be helpful in several ways. It ensures that all groups are represented and often leads to a better-integrated model. It can also help build buy-in and commitment to the project, and can greatly facilitate the data gathering process.

2. Develop a conceptual model — Building a conceptual model is one of the most important pieces of any linkage study. The conceptual model is essentially the team's view of what happens in their organization. The model is typically based on each team member's practical experience and intuition, as well as any pre-existing research. This model represents the team's initial prediction of what causes what and will be modified accordingly after the data are

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Forming a conceptual model before analyses are conducted brings with it three key benefits. It forces the team to look at the organization as a system and consider what really is important for the organization. It ensures that the team takes stock of which data are available and which are not. It prevents the team from charging forward and analyzing all data just because they can, or only those pieces of information that are easy to obtain. Just because certain pieces of information are not currently available does not mean they should be excluded. Alternatively, just because the data are available, does not mean they should be included.

Table 1.

Pros and cons of different linkage techniques.

Technique	Pros	Cons
Correlation	• Works with a small number of units • Easy to understand and to explain	• Can only look at relationship between 2 variables – many models are more complex • Does not determine causality - won't tell you what causes what
Multiple Regression	• Can show causality • Can deal with multiple variables	• Requires larger # of units • Interpretation can be misleading if variables are highly related to one another – a common occurrence in survey research
Structural Equations Modeling	• Can show causality • Can deal with multiple variables	• Complex and difficult to explain • Requires larger # of units • Unforgiving of poorly designed (e.g., unreliable) measures
Relative Importance	• Can show causality • Can deal with multiple variables • Deals with highly-related variables	• Requires large samples • Complex and difficult to explain

3. Gather data and aggregate to appropriate unit of analysis — Once the conceptual model has been developed, the linking team must obtain data for each variable in the model. If the model depicts a link between customer opinions of auto dealer service and actual number of cars sold, data will need to be obtained for each of these variables. However, given that these data represent different levels of analysis (i.e., opinions are recorded from individuals; cars sold is recorded as the number for each dealership per month), they will need to be rolled up or aggregated to the same level. In this case, it means that the customer opinions will need to be averaged together to create an overall customer opinion score for each dealership. Once aggregated to the dealership level, the customer opinion data can be merged with sales data to form one file. Combining data for all variables into one file is necessary for conducting the statistical analyses.

4. Conduct the analyses — With all of the data at the same level and in one file, the next step is to conduct the analyses. Several different procedures have been used by linkage researchers — correlation, multiple regression, structural equations modeling, relative importance. The choice of procedure depends on several factors, including the quality of the data, the quantity of the data (i.e., the number of units), as well as the complexity of the model and the linking team's comfort with the various statistical procedures. Table 1 provides a brief summary of some of the strengths and weaknesses of different approaches. For example, correlation works well with only two variables but it is less appropriate to use to develop more complex models. While structural equations modeling can deal with many variables, it is more difficult to explain and to run. Multiple regression is easier to explain, but it does not work well when variables are highly correlated with one another. While each method has advantages and disadvantages, the ultimate objective remains the same — to determine the strength of association (i.e., the links) between the variables in the model.

5. Interpret the results — With the analyses complete, the next step is to display the values for each link. Figure 1 displays an example of this for a chain of retail stores. At the left are four dimensions from an employee opinion survey (service orientation, engagement, satisfaction and communication). Customer perceptions of service quality are in the middle and outcomes (sales growth and customer retention) are to the right. Solid lines indicate a strong relationship while dashed lines indicate a weak or non-existent one. Of the employee attitude variables, it can be seen that service orientation and engagement have the greatest impact on customer perceptions of service quality. Customer perceptions of service quality, in turn, have a significant effect on both outcomes. Taken together, this model suggests that improving

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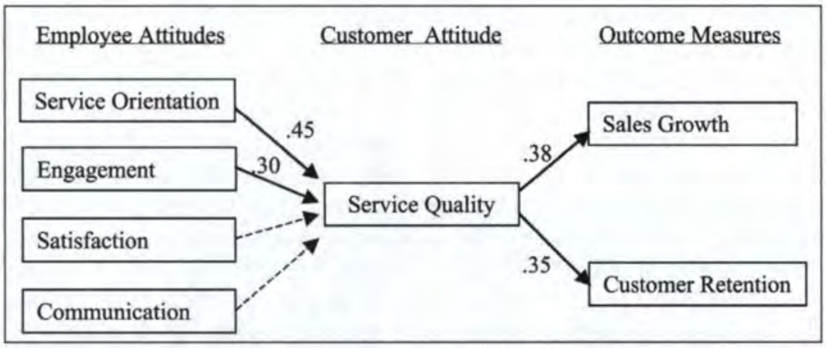
Figure 1. Example of Linking Model for Retail Stores



employee opinions regarding service orientation and engagement should have a direct effect on customer attitudes, which will ultimately improve sales growth and return visits.

6. Take action — After the analyses are conducted and the results displayed in the model, the next step is to decide how and where to focus attention. According to Figure 1, it would appear that customer satisfaction, sales growth and retention can be improved by increasing employee engagement and service orientation. The next step is to determine if engagement and service orientation are problem areas for the entire organization or for particular locations. If all store locations received low scores on both variables, then the organization must take action systemwide. However, if some locations had high scores on these variables and others low scores, action is really only needed in those locations where scores are low. If, on the other hand, engagement and service orientation scores are high for all stores, the next step would be to take a closer look at scores on the other variables in the model (satisfaction and communication) for each store location. While satisfaction and communication had a weaker effect on customer satisfaction, they still exerted some influence.

Whether a model is simple or complex, the team should follow this same general process of first looking for the critical links, then examining current scores, then determining how widespread the issue is. If the first pass yields no needed action (all store locations are doing well on the most important variables — service orientation and engagement), the team should then drill down to the next most important variables and continue this until they determine where to focus attention.

7. Revise/re-analyze model over time — Once the root causes are identified and appropriate actions taken, time will need to pass to allow the interventions to have an effect on other variables in the model. The amount of time to wait will vary as a function of how quickly the intervention can take place and also the type of issue. Communication problems, for example, can generally be improved faster than structural or process issues. In either case, after the

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appropriate interval has passed, the model can be re-analyzed to determine if the linkages still hold and if low-scoring issues have improved. Depending on what is found at that point, new priorities can be set and additional actions taken.

Growing interest

Although the practice of linking employee, customer and financial data has its beginnings in the early 1980s, interest in this technique continues to grow. This interest is fueled by several different organizational needs:

• The need to economize and make the most of scarce resources. Linking research can help by pointing organizations in directions that will give them the greatest return for their investment. Rather than focusing on too many things or only on those that receive low scores (but may not be important) linkage research helps organizations focus on the issues that are really important to the organization's success, whether that is measured in terms of customer attitudes or bottom-line outcome measures.

• The need to measure and validate management models/approaches (e.g., HR metrics, balanced scorecard). An assumption underlying most organizational metrics and the balanced scorecard is that employee, customer, process and financial issues are all important to organizational success and are also interrelated. However, critics of the scorecard note that while the idea is sound, these relationships are rarely tested using actual metrics. The modeling techniques of linkage research, however, provide the tools to quantify those associations.

• The need to work in more integrated manner that aligns separate measurements with common organizational goals. Traditionally, survey research programs have been conducted by different groups (e.g., marketing, HR) at different times and for different reasons. Linkage research, by design, pulls these disparate groups and their data together. In addition to providing the organization with a big-picture view of what causes what, it tends to change the way that survey research is viewed. Rather than being annual or semi-annual events, surveys become an important part of the organization's long-term strategy for success.

• The need for proven tools for improving organizational performance. Research has clearly shown that employee, customer and financial issues are significantly related and that by knowing what causes what, organizations can take targeted actions to improve specific outcomes. Rather than focusing on everything or only on low-scoring issues (that are not necessarily important), linkage research helps organizations choose their actions more effectively.

Art and science

In this article, we have reviewed many of the key aspects that can make your linkage efforts successful. However, it is important to note that linkage research is as much an art as it is a science and that there is no one best way to conduct a proper linkage study. Also, most linkage teams develop their skills over time. While linkage research can be challenging, it is well worth the effort.

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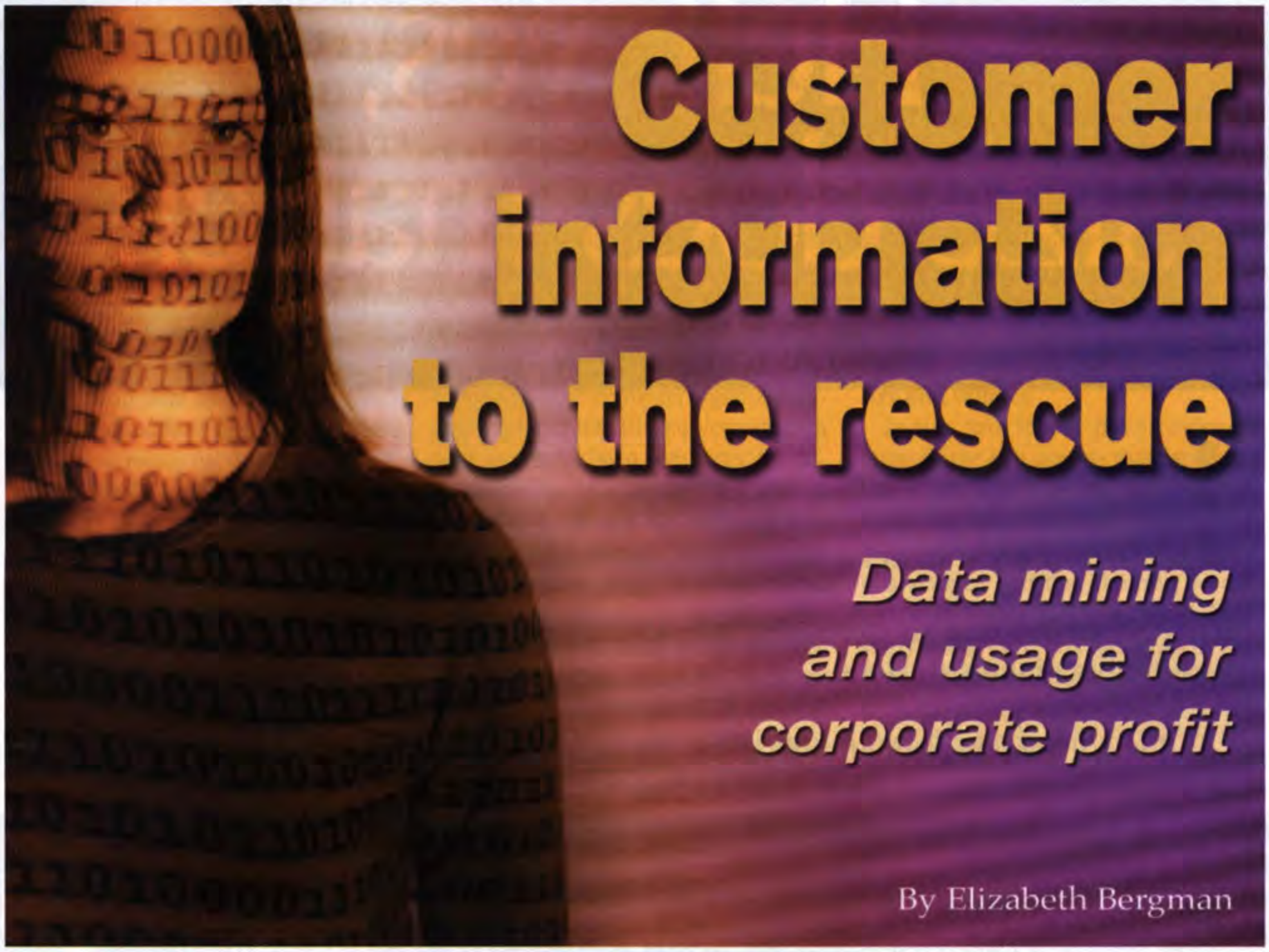

Customer information to the rescue

Data mining and usage for corporate profit

By Elizabeth Bergman

Editor's note: Elizabeth Bergman is an adjunct professor at California State Polytechnic University Pomona. She can be reached at ebergman@csupomona.edu.

Many American companies collect customer satisfaction data, but one has to wonder what effect that customer information has on their businesses. The 2002 holiday shopping season turned out to be the worst in 30 years, and the list of troubled companies that are ailing because they have fallen badly out of sync with their customers is long. Consider McDonald's, which recently faced its first quarterly loss in 37 years. Nimbler competitors with menus in tune with increasingly diverse tastes are eating the burger chain's market share. Profits at Levi Strauss and The Gap have faded more than their jeans. Kmart, Ford, and a host of telcos, once poised to dominate, are scrambling to eliminate jobs and survive. The lesson? As long as customers have the luxury of choice, corporate profits will remain linked to satisfying them. The problem? Insufficient understanding of the mountains of customer data collected. Only companies that know their customers' needs will thrive. This is a tremendous opportunity for the research community.

Arguably, companies are not sufficiently mining their customer information nor using it in creative ways. Often overlooked, customer satisfaction data incorporated as a part of market segmentation efforts conducted during the business planning process provides results. Admittedly, business planning may not be the traditional province of research managers. However, it's an effective point at which to begin establishing the importance of customer satisfaction information.

Planning 101: customer satisfaction meets customer segmentation

Customer segmentation is typically part of the planning regimen as it answers the critical "Who do we sell it to?" question. However, once product managers determine the answer, they very rarely carry the same logic to the next step, asking "How satisfied are our customers in each of those market segments?" And further still, "Are we treating different customers differently?"

Companies typically segment satisfied vs. not satisfied customers — creating programs aimed at each, or choosing to address the dissatisfied segment only. We all know how expensive it is to gain a new customer, so customer retention receives heavy attention. An example from Johnson Controls is illustrative: of the company's 80,000 cus-


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tomers, 82 percent were viewed as very satisfied or satisfied, as indicated by a 5 or 4 response on a 5-point survey scale. That meant that there were 65,600 satisfied customers; of these, about 10 percent (6,560) would probably leave during the year based on calculated retention rates. Conversely, 18 percent were dissatisfied customers; however, defection rates for the dissatisfied group are much higher — as much as 50 percent. Multiplying the defection rate times the dissatisfied customers meant 7,200 customers would leave. Combining the two defecting customer pools yields almost 14,000 lost customers — the focus of Johnson Controls customer satisfaction improvement program (Naumann & Hoisington 2001).

That said, simply segmenting according to who is happy and who is not doesn't reveal what may be important nuances about your customers. For example, a mid-cap software manufacturer took the extra step of matching customer satisfaction scores to market segmentations created in the business planning process. What this revealed was differing levels of satisfaction across groups of customers. Upon investigation and examination, it was revealed that these different customer groups did in fact receive different levels of service. This is not necessarily a bad thing. It may be appropriate to provide high levels of service to highly profitable customer segments. Customer satisfaction data can serve to illuminate and validate such practices.

Table 1: Proxy Variable Creation

Variable	Proxy	Need	Buying Behavior	Segment
1. Buying Behavior	Company X Products	Point solutions-	Product A	Insurance Seekers
		Multiple platforms -	Product B	Availability Mgrs
		Historical data -	Product C	Optimizers
		Business Views -	Product D	Service Visionaries
2. Profitability	Company X Revenue			Revenue bands

The process described in this article may appear unique to an industry and its customer base, but it can be easily replicated across industries by discerning the following:

• Identify the buying behavior of your customers. (What are customers buying? In what combination? Based on what needs?)

• Determine the types and amount of service customers receive. (For example, in many industries, companies designate Level 1, Level 2 and Level 3 support.)

This purchasing and service information must be transformed into data; create new variables for each in a meta file (an example is shown in Table 1). Then customer satisfaction data and customer revenue data must be merged into a meta file. If possible, it is beneficial to also have Standard Industrial Classification (SIC) codes, among other data, appended to the meta file. Dun and Bradstreet can do this for a nominal per record fee.

Now comes the fun part — data mining. There's certainly no limit to the types of analyses that can be conducted on a data file chock full of company and customer information (factor, cluster, Pareto, correlation — to name just a few). An important part of the value-add that client-side research managers bring to their employers is an understanding and knowledge of the company's business; for an adept, astute researcher that exposure and this data can generate eye-opening results. For instance, running a crosstabulation of revenue by segment will likely reveal critical information about customer spending that can be used to figure out segment profitability. An example is shown in Table 2. In addition, conducting a Pareto analysis based on the delineated buying and service groupings can be very useful. A sample is shown in Figure 1.

Case study

For the case study company, defined as Company X for present purposes, the major challenge is to balance the cost of software development, which is driven upwards by the need to keep customer satisfaction high, with the opportunity to sell to new customers, which is low, given the mature state of the market.

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TABLE 2

Revenue Band*Segment Crosstabulation

Revenue Band		Segment				
		Insurance Seekers	Availability Managers	Optimizers	Service Visionaries	Total
>5M	Count		17	18	22	57
	% of Total		.6%	.6%	.7%	1.19%
1M-5M	Count	32	155	131	36	354
	% of Total	1.1%	5.2%	4.4%	1.2%	11.9%
500k-1M	Count	80	163	107	20	370
	% of Total	2.7%	5.5%	3.6%	.7%	12.5%
100k-500k	Count	614	416	291	24	1345
	% of Total	20.7%	14.0%	9.8%	.8%	45.3%
25k-100k	Count	618	109	93	22	842
	% of Total	20.8%	3.7%	3.1%	.7%	28.4%
Total	Count	1344	860	640	124	2968
	% of Total	45.3%	29.0%	21.6%	4.2%	100.0%

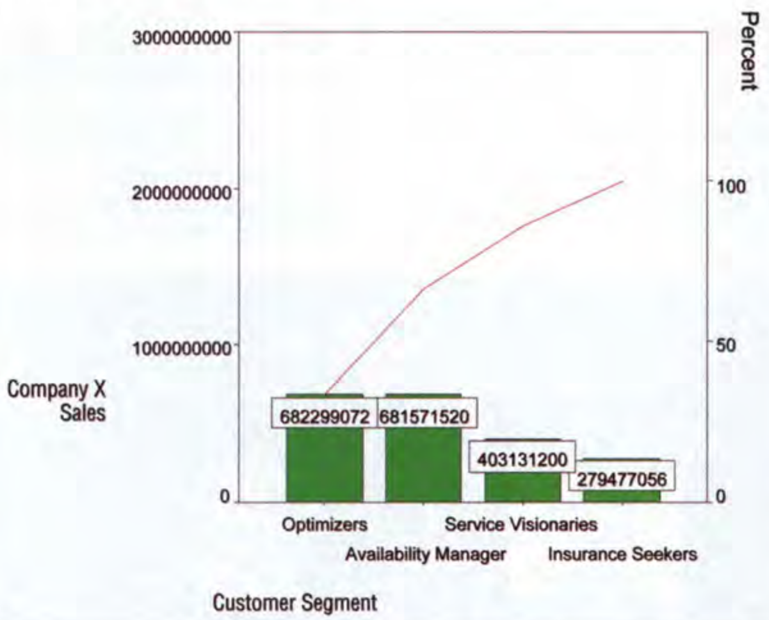
Unlike a growing market, where product investment drives both new revenues and the satisfaction of existing customers, ensuring a good return on investment in a mature market poses a challenge. In the past, Company X's approach has been centered on the innovators and early adopters of technology, satisfying their needs and reaping the trickle-down rewards in the more conservative and late adopting customers. However, this approach became problematic in a technology-lagging market. In many cases the powerful, flexible solution the company built for the innovators became overly complex and too difficult for the other customers to use. As a result, satisfaction and sales fell year-over-year and management was desperate for a new approach.

Needs and buying behavior

The first step was to find out customers' needs relative to Company X's products based on the business criticality of a customer's underlying business applications. Clearly this is dependent on the customer's own business segment: a financial trading company will have highly critical business applications whereas an educational establishment's applications will be less critical. A "criticality" variable was assigned to customers based on industry type taken from the Dun and Bradstreet database.

Next, customers' views of systems management as a core competency or as an unavoidable chore was determined. Some organizations see the ability to deliver high performance and high availability as a key asset to their business; we referred to this as "core." Other customers see systems management as a necessary evil: applications need to stay up and performing but achieving that does not add anything to the business. This was labeled "chore." I created proxy measures for "core" versus "chore" by identifying the historic product buying behavior of customers. Customers with only the most simplistic products were assumed to be in the chore category, seeing their purchase of these products as insurance against systems problems. Customers adding more complex products were viewed as taking a more proactive approach to systems management as a core need.

Figure 1: Company X Pareto Analysis



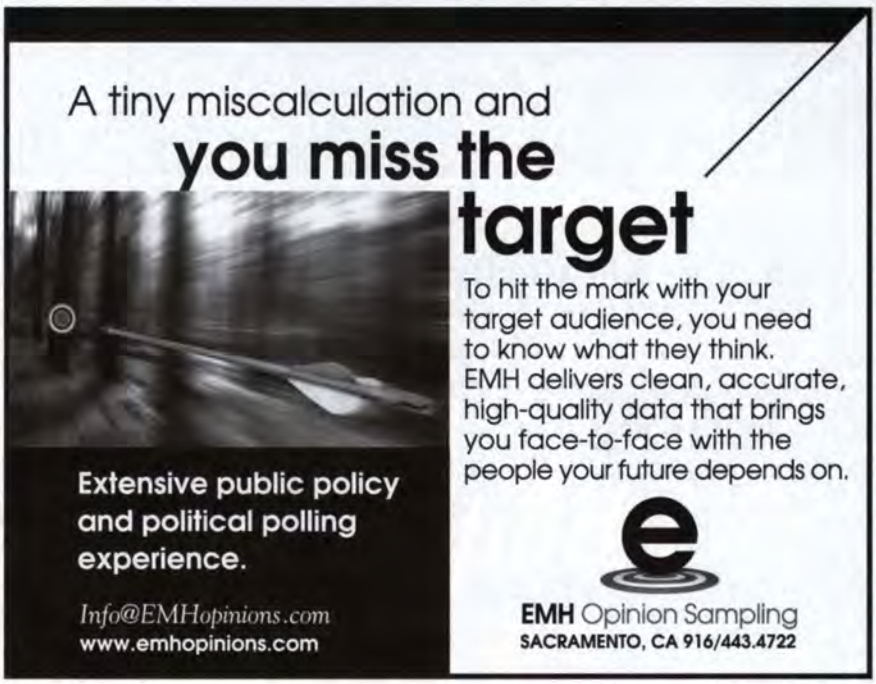
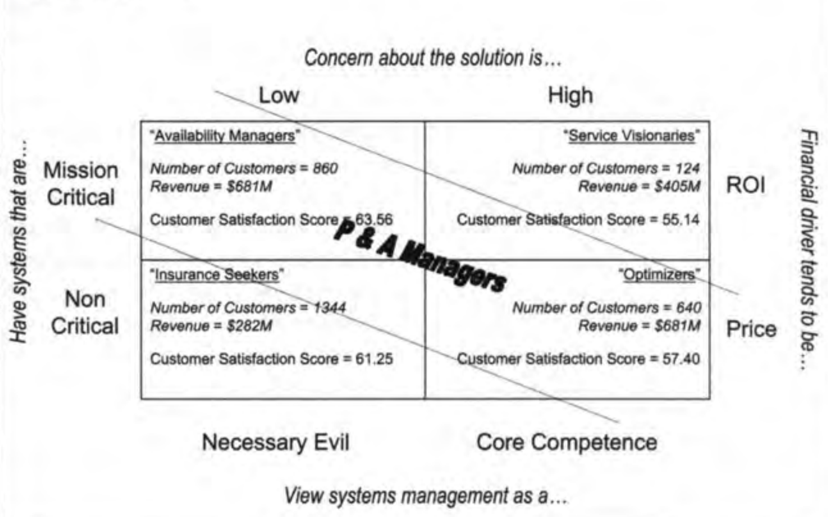


Figure 2: Segmentation



Segmentation

To its surprise, the company discovered that its customers are not homogeneous, and "being a Company X customer" does not describe their needs as individual customers. The results of this segmentation are shown in Figure 2. Each segment is named and has a set of unique characteristics.

The Service Visionaries are the critical and (hard-) core customers. This is a small number of large-enterprise customers, typically in banking and financial services that manage large-scale mission-critical applications and approach the system management challenge through high levels of automation and integration. These customers are typically trying to build "single points of control," and they take their enterprise systems management seriously.

On a revenue-per-customer basis, the Service Visionaries are the best customers but as a group they are not the biggest source of revenue. They are however, the biggest source of work and cost in terms of hand-holding, support and general account management. In short, the Service Visionary segment of customers are the company's greatest supporters and worst critics. The Service Visionary customer satisfaction score as a group is low; they will always want more features (their features!) and tend to stress product capability to the maximum.

The good news on the Service Visionaries is that they have highly customized and integrated environments. That makes them very loyal as the costs of switching to another vendor are very high; it's not surprising then that the amount of customer churn in this segment is very low.

In stark contrast to the Service Visionaries, the Insurance Seekers are those customers in non-critical (or low-critical) businesses who have no interest in systems management beyond, perhaps, problem-solving. These customers are typically smaller enterprises and, while they are valuable customers, they probably receive little care and atten-

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tion from the company. Nevertheless, this lower level of attention is acceptable as these customers are essentially product users only and, as their high satisfaction score indicates, tend to be happy with the product. The Insurance Seekers are the smallest revenue-generating segment, both as a group and on a per-customer basis. However they are also the cheapest customer segment to service and support.

Between the Visionaries and the Insurance Seekers exists the largest segment, made up of two groups, the Performance Managers and the Availability Managers, collectively referred to as the P&A Managers. This segment consists of customers who are either running critical applications or fall into the "core" group. Each customer's defining characteristic — "criticality" or "core" — changes their management needs somewhat, but a bigger overriding segmentation driver applies to this group as a whole: The P&A Managers as a group form a classic conservative, late-adopter, buying segment. The P&A Managers want to solve their system management problems "the way everyone else does" and they don't want that goal to be disrupted by vendors delivering new and complex innovations. They don't want to buy new products that will require them to change their ways and they don't buy into any "vision." They also form the company's single biggest market segment by far.

Company X results

Critical new strategies that would help transform Company X had come about as the direct result of one research manager's transformation of satisfaction and segmentation data during the planning process.

After examining its customer segmentation, Company X discovered that it typically didn't sell — in terms of marketing, positioning and messages — to the larger conservative customer base. As is the case with many technology companies, developers and engineers were enamored of sophisticated, complex technology, and while being long on vision is great for innovative customers, connecting to the more conservative buyer was critical for future success.

Furthermore, Company X discovered that it needed to carefully allocate internal resources while being cognizant of each customer segment. Sales, R&D and all the other necessary internal forces could not be marshaled to serve only those visionary, leading-edge customers that demanded so much, yet were never satisfied — and did not provide the largest profit margin.

Survive and profit

Companies that figure out how to satisfy customers will survive and profit in the 21st century. This article has shown how placing customer information front and center in the planning process can produce dramatic results and transform the way a company does business. Research managers, key cogs in the wheel, are in a unique position to offer vital information and answers.

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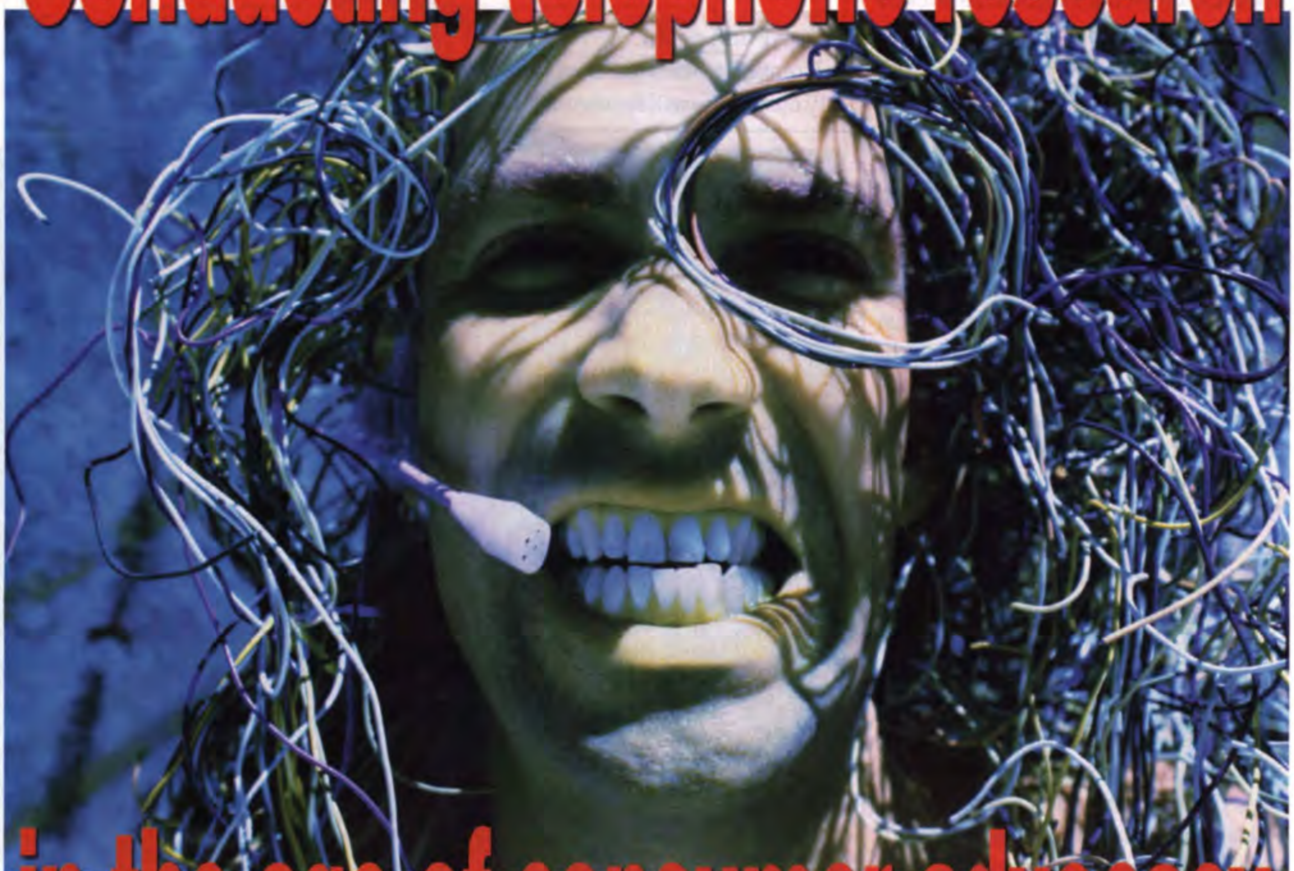


in the age of consumer advocacy

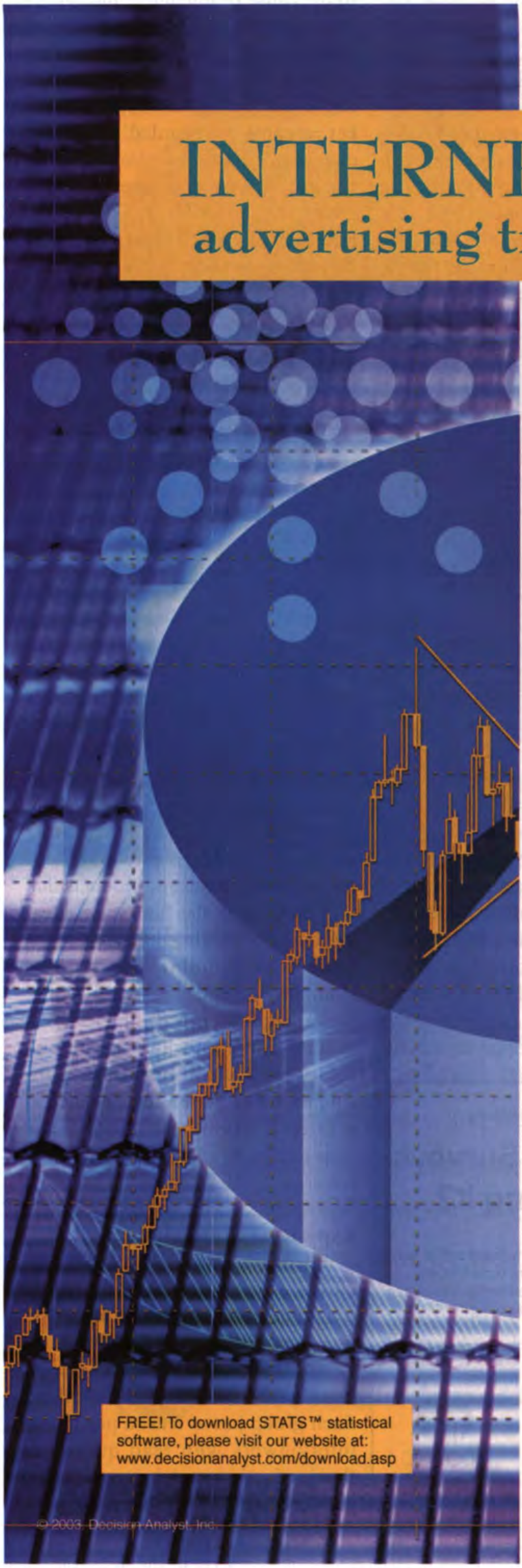
By Al Fitzgerald

Editor's note: Al Fitzgerald is president and founder of Answers Research, Inc., Solana Beach, Calif. He can be reached at info@answersresearch.com.

In a time when consumer advocacy groups battle against telemarketing, conducting research via phone requires unprecedented finesse. With the creation of do-not-call registries and the proliferation of anti-telemarketing devices, researchers often opt for a Web-based approach whenever possible. While researchers are excluded from restrictions limiting contact, the advent of these laws has encouraged consumers to question the legitimacy of all unsolicited telephone calls. When a telephone methodology is the most appropriate fielding method, researchers are wise to implement any possible measure to tilt the tide toward high-response telephone research. Establishing a non-sales identity using only experienced interviewers and moving beyond traditional contact approaches can only increase the success of a phone research study.

Phone vs. Web research

While online research is fast encroaching on the benefits of telephone research in the way that telephone research overshadowed costly in-person or time-consuming mail surveying, there remain key benefits not yet matched by any other fielding method. Achieving a true general population sample is most accurately gained by conducting a random-digit dial (RDD) methodology, though this is changing with the



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increase of Internet usage and the percentage of unlisted phone numbers. Still, with a 95 percent phone penetration rate within U.S. households, telephone surveying is the most efficient means to gather data representative of the general population.

When trying to reach a target group with only a limited contact list, researchers often opt to call each list member, one by one, in lieu of sending a single e-mail invitation to the group. Finally — and depending on the study objectives, most importantly — telephone surveying allows for open-end response probing not possible with a Web design. With a live interviewer clarifying questions and respondent answers, researchers stand a great chance to learn specific and personal reasons why a respondent holds a certain opinion.

Increasing hurdles

With telemarketers continuing their assault on the nation's consumers, the Federal Trade Commission (FTC) has beefed up the telemarketing sales rule to further restrict unsolicited callers. As of June of this year, consumers are able to put their phone numbers on a national do-not-call registry, making it illegal for most telemarketers or sellers to call an included number. Inclusion on the list is free to consumers, but it is the responsibility of telemarketers to scrub their lists against the registry on a regular basis, and they face steep fines if a member is contacted. Consumers have participated in droves, with some 30 million registered since the federal program began. While market researchers will be excluded from the amended regulations, individuals targeted for recruitment may ask to be removed from the caller's contact list. An association with current FTC amendments will only increase such requests.

Adding to the lineup of contact hurdles, electronic devices including the TeleZapper are inexpensive gadgets designed to thwart computer-dialed calls by emitting a disconnected tone. Once the computer associates the disconnected tone with an invalid number, the individual is removed from the list — or at the very least, removed from sample used to complete a study. Many frustrated consumers opt to let their answering machines provide a case-by-case avoidance service. Simply screening the calls won't remove an individual from a contact list, but it will postpone contact and recycle the number for a callback.

Make your calls count

When a live person answers the phone and pauses to allow a short explanation for the call, an "attempt" has turned into a chance for a "complete" and it's important to make your introduction count. Unfortunately, those in the research or marketing field most sympathetic to the cause of telephone interviewing are the least likely to qualify to complete the questionnaire because of their industry affiliation. It is important to keep in mind that market research is regarded as a close cousin to traditional telemarketing and the average consumer is suspicious of a caller's intention. Respondents relax only slightly with the assurance that "this is not a sales call." Fundraisers and other solicitors have caught onto this trick and use it often. While they may not be selling any product by traditional means, a successful call closes with the verification of the expiration date on a Visa card.

If disclosing the research sponsor will not adversely affect data collection, this should be announced early. The benefits of increased study participation and decreased cost and timing for fielding often far outweigh bias concerns. Potentially reticent customers may be persuaded to participate once they learn the survey is underwritten by a company producing products of interest. If a customer is contacted by a company with which they have an affiliation, there is often a greater stake in reporting positive or negative feedback to impact development of products that will be used in the future. An ideal invitation would be "I am calling on behalf of Popular Electronics Company X and we are awarding participants $10 to complete a 10-minute survey to help us design future products." Sometimes consumers are recruited for a chance at a lottery winning or simply the opportunity to affect future product releases.

Experienced interviewers

Whether a survey is sponsor-disclosed or with or without an incentive, it is crucial to deliver information surrounding the survey in clearly understandable terms. A phone room is filled with a variety of talent. Each group has at least a portion of interviewers who read questions flawlessly, pronouncing even difficult technical terminology with ease.


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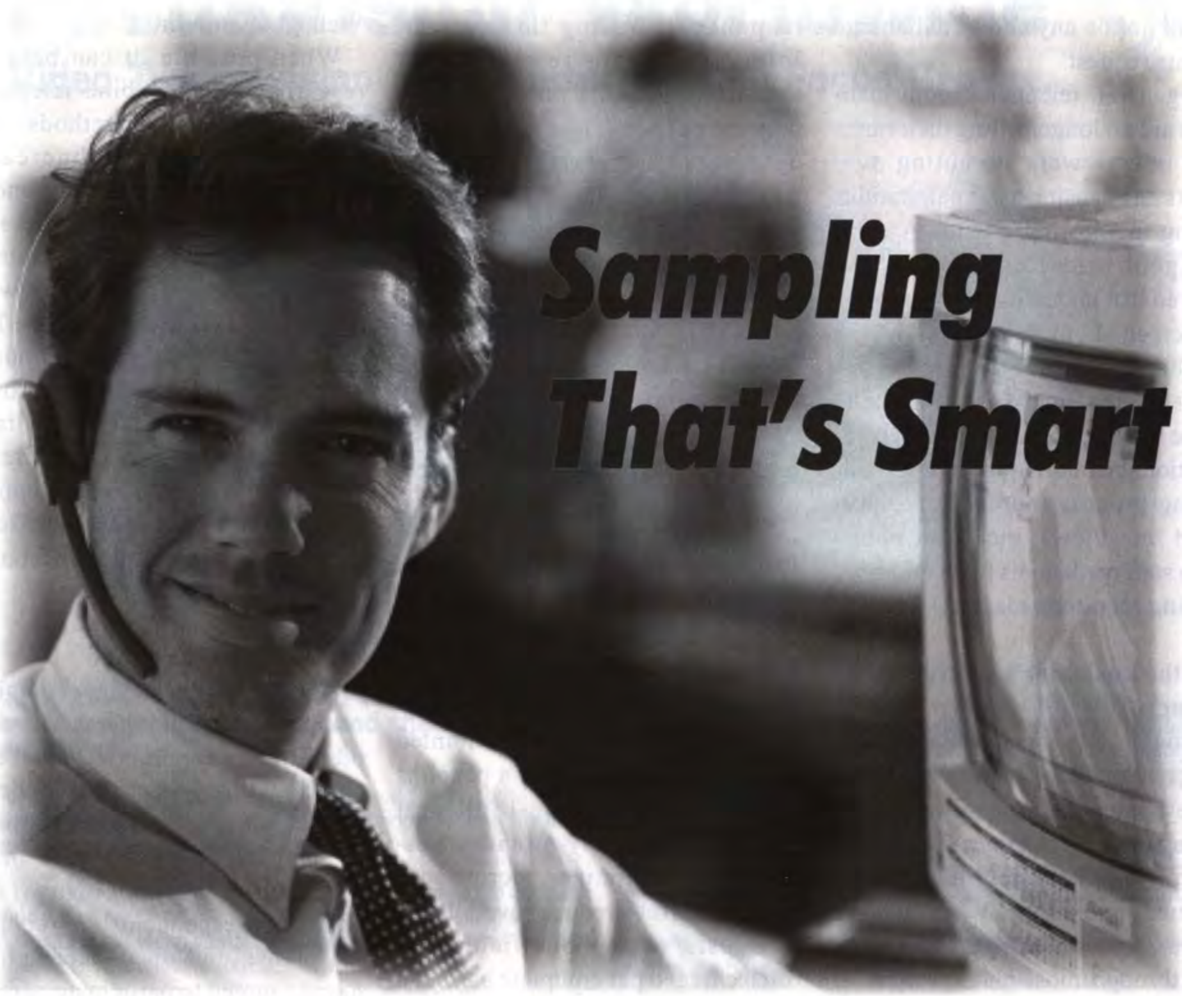

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In general, telephone room managers are no longer filling their ranks with interviewers stumbling over scripts and causing heart palpitations among monitoring clients. A more stringent interview process has ensured that unqualified interviewers are screened out before they are on the phone with potential respondents or customers. Before selecting a telephone facility, researchers are wise to question the internal interview monitoring process (percent of supervised interviews, etc.) and phone room staff credentials (education and training requirements, etc.).

"At the customer's convenience" calling

Though it is most convenient to secure immediate participation to a survey, potential respondents may be willing to complete a survey at a later time if given the option. To ensure all avenues are explored when fielding studies, toll-free numbers are available through most phone rooms so that busy respondents can complete an interview at their convenience. Additionally, most CATI software allows interviewers to schedule callback appointments with potential respondents. Using this system, interviewers are reminded via time/date computer prompts to recontact respondents to complete unfinished interviews. If a potential respondent feels his or her valuable schedule is being considered, he or she may be more willing participate in research.

Utilizing telephone panels

While online panels are often touted as a reliable way to reach a respondent group while maximizing research budgets, the same can be said of telephone panels. Similar to a Web-based database, telephone panels include a group of screened individuals who have agreed to participate in ongoing research. Incentives are arranged before joining and survey participation is generally limited to avoid any bias. Using a panel as opposed to a random-digit dial method or company-provided customer list minimizes recruitment time and thereby reduces overall project costs. (Telephone fielding is often charged per complete based on an estimate of how many minutes, including finding a respondent willing to take a survey, it takes to achieve a completed questionnaire.)

Web-phone method

When possible, it can behoove researchers to combine telephone and online fielding methods. This approach allows for increased response rates and broad respondent reach. Once finalized, the survey is programmed for both computer-assisted telephone interviewing (CATI) and Web completion. This dual programming accommodates both methodologies, and by providing for both techniques simultaneously, programming charges are not increased. Web-based and telephone data can also be compared to see if there are any substantial differences between the groups.

Mail-telephone method

Another hybrid fielding technique combines mail and telephone methods. This is an appropriate choice for studies where it is critical to view a tangible sample (i.e., photos or printer samples) to be critiqued in the research. Implementing this approach, respondents are recruited via phone, and once screened and having agreed to participate, are sent a packet including the samples. After reviewing the documents, respondents are re-contacted via phone to collect their feedback. By ensuring respondents are pre-screened and willing to participate, researchers minimize the large postage and printing expense typically associated with the vast amount of pieces needed to field unsolicited mail surveys.

Minimize headaches

While there are several hurdles to conducting telephone research, marketers can minimize headaches by implementing measures that put the potential respondents at ease. By considering the customer and implementing approaches that make the process more palatable to respondents, researchers stand to decrease the overall cost of data collection and increase the likelihood of a successful telephone research project.

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Survey Monitor

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The average consumer expected to spend $206.24 on clothing, $84.44 on shoes, $74.04 on school supplies and $86.03 on electronics and computer-related equipment.

NRF projected a 4.5 percent growth in GAFS sales (general merchandise stores, apparel stores, furniture and home furnishings stores, electronics and appliances stores, and sporting goods, hobby, book and music stores) in the second half of 2003, up from 2.2 percent in the first half. NRF partially credits the boost in back-to-school spending to the $13 billion in tax credit checks that were sent to more than 25 million families.

Kids and teenagers also planned to hit the stores before heading back to school. Nearly half of parents (43.6 percent) said their teenagers would be spending their own money on back-to-school items. Teenagers who were to spend their own money planned to spend an average of $62.71, according to parents. Also, 26.0 percent of parents said that their 6-12-year-olds would spend their own money. The average amount of their own money spent by a 6-12-year-old is $32.63.

Most consumers shopping for back-to-school items shop at discount stores (78.1 percent). Many consumers also planned to purchase products at department stores (49.5 percent) and office supply stores (31.9 percent). Also, 20.2 percent planned to purchase goods at specialty stores and 16.4 percent will shop at drug stores.

The survey, which polled 8,835 consumers, was conducted for NRF by BIGresearch from July 2-9. The consumer poll has a margin of error of +/- 1 percent. For more information visit www.nrf.com or www.bigresearch.com.

Connecting trend drives stationery market

A new research study from Unity Marketing points to connecting as the next major trend on the consumer horizon. Connecting relates to consumers' need to reach out and communicate meaningfully with others, using everything from electronic networked communications to paper greeting cards to a handwritten note on hand-laid paper.

The study, entitled "Stationery & Greeting Card Report, 2003: The Market, The Competitors, The Future Trends," cites connecting as key driver of the $14 billion stationery and greeting card market. "Consumer trends reflect the emotions of the times, and our time is all about reconnecting to the outside world after spending the past decade wrapped up in our personal 'cocoons,' " says Pam Danziger, president of Unity Marketing and author of the study.

"The consumer psychology of the '90s gave rise to conspicuous consumption and a passion for collecting more and more stuff to fill up our 'nests.' In the new millennium, however, consumers are focusing on enhancing their relationships with others. So the collecting frenzy of the '90s morphs into a passion for creatively collecting and sharing one's memories through scrapbooking."

Scrapbooking is an important new consumer passion that is just emerging on the horizon. With a sales jump of 29 percent in 2002, scrapbooking is the fastest growing segment in the stationery market, with $1.2 billion in consumer sales.

Despite vibrant growth, the scrapbooking market has only begun to hint at its full potential. Today only 20 percent of adult consumers have purchased scrapbooking supplies in the past year, trailing behind the 67 percent of consumers who bought greeting cards; 61 percent who bought gift bags and wraps; 44 percent who bought calendars; and 37 percent who bought boxed greetings, notes and invitations.

"Scrapbooking is a hobby that uniquely fits our stressful post-9/11 era," Danziger says. "It creatively connects families with their past, present and future. Its appeal crosses generations, genders and age ranges. Key to the future success of the scrapbooking market will be its ability to make the quantum leap from the niche-focused craft market into the mass-market realm. The Michael's craft chain just opened the first of a chain of stores devoted to scrapbooking, called Recollections. This launch may broaden exposure beyond the traditional crafting market and bring scrapbooking into the mainstream where it will really blossom."

Today with all the major greeting card brands, like Hallmark and American Greetings, firmly entrenched in discount channels selling greeting cards in the 99 cents or under price range, the industry has sunk to the bottom of the pricing spectrum and little future growth will be achieved at these depths.

But the luxury realm of specialty paper, including handmade paper cards, specialty stationery, books and journals along with luxury writing implements, offers marketers significant growth opportunities. "Writing and receiving a beautiful handwritten note is the ultimate expression of luxury communication. The New York specialty store Kate's Paperie, which offers a selection of over 4,000 luxury paper products, perfectly reflects the trend toward luxury stationery and personal connecting in the market today," Danziger says.

"Our survey of some 50 stationery companies identified a huge missed opportunity in the marketplace: less than 10 percent of the stationery companies surveyed offer products to the scrapbooking market. Stationery companies need to venture beyond their comfort zone of greeting cards and traditional stationery products to capture some of the dynamic growth and market potential available in the scrapbooking trend," Danziger says. For more information visit www.unitymarketingonline.com.

Electricity providers top satisfaction ratings among utilities

Although Americans are generally satisfied with the service provided by their utilities, electricity providers receive the highest marks, according to a study by Opinion Research Corporation, Princeton, N.J. Of the three major utilities — electricity, water and local telephone — with very widespread (i.e., at least 87 percent) usage across the country, customers are most satisfied with electric companies (69 percent), followed by water (65 percent) and local telephone service providers (60 percent). Satisfaction is defined as rating the utility an 8, 9 or 10 on the 0-10 scale.

At the bottom end of the satisfaction scale, dial-up Internet users reported only a 36 percent level of satisfaction.

Among the other findings of the study:

• Long-distance telephone service, with an 80 percent usage by Americans, achieved a 52 percent satisfaction level. Southern customers (58 percent) are most satisfied with service they get from their long-distance phone carrier.

• Customers in the South (66 percent) and Northeast (65 percent) are more satisfied with their local phone service than those in the Midwest (55 percent) or West (52 percent).

• Although fewer Americans use DSL/cable modems than dial-up services to connect to the Internet (33 percent vs. 46 percent), the level of satisfaction among DSL/cable users is notably higher (53 percent vs. 36 percent).

The Utility Satisfaction study was conducted by Opinion Research Corporation's CARAVAN among a nationally representative sample of 1,015 adults 18 and older. The survey was conducted February 21-24. The margin of error for the percentage using each utility is +/-3 percent. Satisfaction ratings have a margin of error from +/- 3 percent for local phone and electricity to +/- 7 percent for oil, at the 95 percent confidence level. For more information visit www.opinion-research.com.

Wi-Fi not taking off yet

While consumer awareness of Wi-Fi hot spots has reached a fairly high mark, the market for these services has not grown beyond today's business travelers, according to "Public Hot Spots: One Truth and Two Myths," a new white paper released by Parks Associates, a Dallas research firm.

The white paper offers consumer perspectives on public Wi-Fi hot spots, gathered from a survey conducted by Parks Associates which asked Internet households about their usage history and interest in hot spots, as well as their work-related travel habits, and found that 90 percent of the people interested in using hot-spot services travel nationally for professional purposes.

"Road warriors and business travelers are likely to be the early adopters of hot-spot services — the industry has that one right," says Yuanzhe (Michael) Cai, research analyst with Parks Associates. "However, the frequently quoted market inhibitors such as limited coverage and poor consumer awareness only tell part of the story. Service providers have to re-examine their value propositions and customer services. In addition, they should not overlook narrowband Internet users."

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Among the white paper's conclusions is a challenge to the common industry ideal "build it and they will come." Whereas more than 60 percent of U.S. Internet households are aware of hot spots, only a small fraction have used the services. Also, broadband was not a differentiator in terms of interest in hot spots. Broadband and narrowband Internet users reported similar usage rates regarding hot-spot services, and the difference between their levels of interest in adopting the services is not overwhelmingly significant.

Based on consumer surveys and interviews with service providers, Parks Associates estimates the 2003 service revenues for hot spots will be $105 million. Further, the firm estimates that the U.S. hot-spot service market will exceed revenues of $800 million by 2007. The compound annual growth rate (CAGR) between 2003 and 2007 is approximately 50 percent. For more information visit www.parksassociates.com.

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Broadband users are big shoppers

A study by New York-based Scarborough Research shows that American adults with at-home broadband connections accounted for almost one-third (31 percent) of all consumer online spending last year totaling 15 billion dollars. At home broadband users — those who used an ISDN, DSL technology or a cable modem to access the Internet in the past 30 days — currently represent 19 percent of online adults. America's 23 million broadband users are twice as likely as all Internet users to have spent $2,500 or more online in the past 12 months. Broadband users are 39 percent more likely to purchase jewelry online; 64 percent more likely to purchase toys and games online; and 64 percent more likely to purchase cars, trucks and SUVs. Furthermore, broadband users are more likely to use the Internet to view traditional media content than other Internet users. This escalating category of Internet users is the next generation of Web users and information seekers.

Broadband users are 68 percent more likely than all Internet users to have read a magazine online and 40 percent more likely to have read a newspaper online in the past 30 days. One-fifth (20 percent) of broadband users listened to the radio online in the past 30 days, making them 72 percent more likely than all Internet users to do so. As compared to all Internet users, broadband users are 42 percent more likely to have visited a broadcast television network Web site in the past 30 days and one-third (33 percent) more likely to have logged onto a local television station Web site. They are also 45 percent more likely to have accessed Internet yellow pages in the past 30 days.

"Traditional media Web sites, which have often been perceived mostly as extensions of their broadcast or print counterparts, are able to provide richer online experiences to those with broadband connections and offer rich content like streaming audio and video, interactive games, and sophisticated graphics and downloads," says Gary Meo, senior vice president, Internet and print sales, Scarborough Research. "Their ability to integrate traditional content with rich media also allows online marketers to present advertising in new and exciting formats. The continued adoption of broadband is one of the key drivers of the advertising growth that online companies have been experiencing this year."

Compared to all Internet users in the U.S., broadband users are well-educated (12 percent more likely than all adults accessing the Internet to hold a college degree and 17 percent more likely to have a post-graduate degree) and affluent (32 percent more likely than total Internet users to have household incomes of $75,000 or more). Slightly more than a quarter (26 percent) of broadband users are between the ages of 35 and 44 and almost half (49 percent) have one or more children in the household.

"At-home broadband consumers spend more money online than the average Internet user and their affluence and education levels make them a favorable marketing target," says Meo. "Local media outlets can take advantage of broadband penetration in their markets — and the expanded creativity of rich content — to reach this valuable consumer group with content and advertising."

The data for this report was compiled from August 2001 to September 2002 from Release 2 of the 2002 Scarborough USA+ Study. Data is gathered from more than 200,000 interviews with adults, age 18 and over, in 75 of the county's largest markets. For more information visit www.scarborough.com.

Consumers show little commitment to fast-food brands

Despite heavy investment in marketing, fast-food consumers show a very weak commitment to national fast-food chains, according to a study conducted by TNS Intersearch, Horsham. Pa. Of the national chains, Subway and Wendy's have the highest consumer commitment. McDonald's and Burger King have a weaker base of committed customers, and a high proportion of consumers at risk of defecting — this despite the fact that the larger chains spend more on advertising (a combined $909,439,500 versus a combined $498,712,900 for the year 2002, according to TNS Media Intelligence/CMR).

Despite competition from the majors, regional chains are coming on strong in terms of consumer commitment with Panera Bread, In-n-Out, Chipotle Mexican Grill and Chick-Fil-A among the top performers.

The study found that three out of 10 fast-food consumers are not committed to any specific brand because the decision of where to go for fast-food is not considered important.

According to the TNS Intersearch Fast Food Consumer Commitment study, half of fast-food consumers either choose their brand over and over again by autopilot or spread their fast-food spending over several brands that they like equally. Compared to the commitment level in a broad range of other categories, for example automobiles or soft drinks, this appears to place fast-food brands at the bottom of the list from a consumer commitment standpoint.

There is one bright spot for fast-food chains, however. The survey showed that one-fifth of fast-food consumers are especially loyal to the brand they choose, and although they may sometimes frequent other brands, they are committed to only one.

The results also indicate that among the national chains, Subway and Wendy's stand out with above-average consumer commitment, with 12 percent consumer commitment for Subway and 10 percent for Wendy's.

Consumer Commitment for National Fast-Food Chains in 2003

Percent of Users Who Are Committed	
Subway	12
Wendy's	10
Taco Bell	7
McDonald's	6
Burger King	4
Pizza Hut	3
KFC	3
Domino's	2

"Both chains also show a strong ability to attract new customers," says Ken Athaide, executive manager and senior vice president, TNS Intersearch, Restaurant Practice. "The data suggests that these chains have provided offerings to meet the needs of more than one single target."

In contrast, fast-food market leaders McDonald's and Burger King have applied a consistent and prolonged promotion of value pricing that seems to have led to the positioning of fast food as a commodity, resulting in low commitment levels.

"Hence, the fast-casual chains have prospered in the midst of the battle in the value space," says Athaide. "This subcategory offers quality and newness without value pricing."

As a group, the regional, fast-casual chains achieve a higher consumer commitment than the traditional burger, Mexican and chicken subcategories, with Panera Bread and Chipotle Mexican Grill in the lead. Taking both regional and national players into account, the sub-category winners are In-n-Out Burger, Papa John's Pizza, Chick-Fil-A and Taco Bell.

The study indicates that in the mature fast-food category, traditional national chains are faced with the challenge of building commitment among a broader consumer base while maintaining their core brand identity. The study is based on the results of research conducted among over 1,000 fast-food customers in March 2003. Consumer commitment is calculated using the Conversion Model. For more information visit www.tns-i.com.

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which employs a staff of 50, will be renamed TNS Data. Under the agreement TNS Data's consumer panel will also become part of the Latinpanel network, a consumer panel in Latin America jointly owned by TNS, the NPD Group, Inc. and the IBOPE group.

New York-based **NetRatings, Inc.** has acquired **NetCrawling S.A.**, the developer and marketer of LemonAd, a European online advertising monitoring service. Financial terms of the transaction were not disclosed. To be branded Nielsen//NetRatings LemonAd, the service provides online advertising intelligence for 11 European markets.

Alliances/strategic partnerships

ESRI Business Information Solutions Redlands, Calif., will use **Acxiom Corporation's** aggregated household-level data in Community, a neighborhood consumer segmentation system.

Walker Information, Indianapolis, has added four research firms to its global network: Asia-based **Acorn Marketing & Research Consultants**, India-based **AMRB L.L.C.**, Chile-based **ICCOM**, and Poland-based **SMG/KRC.**

MRB Hellas has been named as **Millward Brown's** licensee in Greece.

Invoke Solutions Tenafly, N.J., will provide **Millward Brown** access to its Dynamic Survey product.

Canada-based data collection firm **Interactive Tracking Systems Inc.** (Itracks) and telecommunications firm **SaskTel** have announced a strategic partnership that will allow Itracks to expand its call center capacity. SaskTel will be providing CAD $1.75 million to Itracks for the expansion and further development of its call center in Saskatoon and its CATI service through a convertible security.

Greenfield Online, Inc., Wilton, Conn., has entered into a multi-year agreement with research firm **ORC International** under which Greenfield Online will handle ORC International's online research data collection needs.

Portsmouth, Va., research firm **Borrell Associates Inc.** has developed a strategic alliance with **Scarborough Research**, New York, to deliver a series of reports on local media. The reports, focusing on the $97 billion local media market, examine areas of revenue growth and strategies for local Web sites.

Association/organization news

As an outcome of its respondent cooperation workshops, the **Council for Marketing and Opinion Research** (CMOR) created a task force to delve into interviewer satisfaction and motivation. The task force created a study to better understand how research interviewers view their contribution to the research process and what factors are related to their level of satisfaction in their current positions. This report details the results of the study, including information on job benefits, incentives, likelihood to stay in the industry and demographics. Volunteers from ISA completed 450 interviews and provided tabulation, and OPINIONation prepared the report. The report can be viewed at www.cmor.org/resp_coop_events.htm.

The U.K-based **Association for Qualitative Research** (AQR) has launched a benefits package for its members, including dedicated employment insurance coverage, preferential hotel rates and a health insurance plan. Separately, the AQR has added an online directory of research terms and definitions to its Web site at www.aqr.org.uk.

Awards

On-Line Communications, Inc., a Van Nuys, Calif. research firm, announced that two of its members brought home awards from the Marketing Research Association's (MRA) 2003 annual conference. Company President Peggy O'Connor was awarded the MRA Chapter Service Award for her contributions to the Southwest Chapter. Vice President of Sales Edward Sugar took home the MRA Award Of Excellence, which recognizes excellence in service to the Association and local chapters during the past year.

Gordon S. Black, chairman and CEO of **Harris Interactive**, Rochester, N.Y., was named the 2003 Ernst & Young Upstate New York Entrepreneur of the Year. Black was chosen as the winner in the business services category for his efforts in the online market research industry as well as for building Harris Interactive into a global market research enterprise. Black will now move on in the Entrepreneur of the Year national competition, the winners of which will be named in Palm Springs, Calif., in November. Ernst & Young's Entrepreneur of the Year program was established to recognize and help motivate individuals demonstrating the highest levels of entrepreneurial endeavor. The program was founded in Milwaukee in 1986. In 2003, it will include 44 regional programs.

ACNielsen U.S. has been selected as one of the best places to work in information technology by IDG's *Computerworld*. The selection is part of the weekly IT newspaper's 10th annual Best Places to Work in IT survey, which was published in the June 9 issue and online at www.computerworld.com.

The U.K. office of **Opinion Research Corporation**, Princeton, N.J., has received an Excellence in Market Research award from U.K.-based *Marketing* magazine. The award recognizes the strategic modeling and analytics project the company conducted for the Nationwide Building Society, one of the U.K.'s largest mortgage lenders and retail banking organizations.

TNS and **Northcliffe Newspapers**, a U.K. regional newspaper publisher, were awarded *Marketing* magazine's Media Research Award 2003. Northcliffe Newspapers selected TNS Media, the U.K. division of TNS specializing in media research, to carry out a project to provide insight into how its newspapers are read. The aim of the project was to maximize readership, increase reader satisfaction and identify ways to better engage readers. The survey was rolled out over 18 months, involving nine regional evening newspapers and 12,000 readers.

Customer Interaction Solutions magazine has named **Advanced Data-Comm**, Dubuque, Iowa, one of the Top 50 Outbound Teleservices Agencies in the United States for 2002. The Top 50 rating is awarded in recognition of outstanding achievement in the teleservices industry including company growth, call traffic in minutes, services offered and available technology resources. The 2002 honor marks the 12th consecutive year Advanced Data-Comm has received this award.

New accounts/projects

Choice Hotels International, Inc. has selected Denver-based **Cohorts** to help enhance Choice Privileges, the company's rewards program for guests at its Comfort Inn, Comfort Suites, Quality, Sleep Inn, Clarion and MainStay Suites hotel brands.

Reston, Va.-based **comScore Networks** announced the signing of a long-term client contract for the use of comScore services that provides for payment by the unnamed client of more than $18 million over five years. In addition, the company reported that it attained its first quarter of corporate profitability.

BMRB Social Research has won a study in the U.K. looking at the public's perception of the standards of conduct required of those in public life. The research involves a CAPI survey of 1,000 adults in Britain, with fieldwork taking place later this year and the final report being published early in 2004.

Nielsen Media Research has reached multi-year agreements with various television operations of Viacom, Inc. for TV audience measurement services involving all Viacom and CBS television businesses. Included in the agreements are 35 Viacom owned-and-operated television stations across 28 markets; CBS and UPN Television Networks; syndicators King World and Paramount; and 12 cable networks — BET, CMT, Comedy Channel, MTV, MTV2, Nickelodeon/Nick at Nite, Noggin, VH1, Showtime, TV Land, SPIKE TV and The Movie Channel.

Carlsbad, Calif.-based **Island Data Corp.** has signed Yahoo! Inc., as a new customer utilizing its Insight RT product. Yahoo! chose Insight RT to

perform real-time analysis to take action on incoming unstructured verbatim customer feedback received on its site. Insight RT captures customer feedback from a variety of sources including customer service and support tracking applications, e-mails, surveys and Web self-service interactions. The solution analyzes the thematic content and intent of the feedback, converting it into customer insights.

U.K.-based **Aegis Media plc** has signed a deal with **TNS** to use TNS's television audience analysis system, InfoSysTV. The agreement runs until December 2006.

New companies/new divisions/relocations/expansions

The July/August issue contained incorrect information on Bonnie Sargent's new firm, **Field Research Services**. The firm is located at 842 Raymond Ave., Suite 105, St Paul, Minn., 55114. Phone 651-644-3150. Fax 651-644-3248. Web www.fieldresearchservices.com.

Singapore-based **Research Pacific Group** has opened Research Pacific Japan.

The **Ipsos Group** has integrated its two Chicago offices into one new downtown office located at 111 North Canal St. The new 21,000-square-foot office will house 60 research and operations staff from the company's Ipsos-Insight marketing research division, the Ipsos-Public Affairs opinion research division, as well Ipsos-ASI.

Mike Page and Kenneth Elliott have co-founded **Cognicient**, a Chicago-area research firm, at 105 East Vallette, #1170, Elmhurst, Ill., 60126. Phone 888-523-7916. Fax 775-593-0866. E-mail info@cognicient.com. Web www.cognicient.com.

Vista Research Services has moved to 434 W. Briar Place, #4, Chicago, Ill., 60657. The new phone number is 773-868-9107. Vista Research provides data processing services using SPSS MR's Quantum software.

Opinion Research Corporation has moved its Princeton offices to a new location at 600 College Road East, Princeton, N.J., 08540-6636. Phone 609-452-5400. Fax 609-419-1892.

Thomas Tseng and David Morse have left Cultural Access Group to start **New American Dimensions,** a research firm located at 6955 La Tijera Boulevard, Suite B, Los Angeles, Calif., 90045. Phone 310-670-6800. Fax 310-670-7158.

U.K.-based customer insight and marketing specialist **dunnhumby** has opened its first office in the United States as part of a partnership with grocery firm The Kroger Co.

Asia Insight Research Consultants Pte. Ltd. has moved to 150 Beach Road, #33-08, Gateway West, Singapore 189720. Phone and fax numbers remain the same.

Company earnings reports

Harris Interactive, Rochester, N.Y., released its financial results for the fiscal fourth quarter and for the full fiscal year ended June 30. Revenue for the quarter was \$35.7 million, up 11 percent versus \$32.1 million of revenue for the fiscal third quarter and up 20 percent from \$29.8 million of revenue reported for the same period a year ago. Revenue for the full fiscal year was \$130.6 million, up over 30 percent from the \$100.0 million revenue posted for fiscal year 2002.

Net income for the fiscal fourth quarter was \$5.5 million, or \$0.10 per share. This includes an income tax benefit of \$3.0 million or \$0.05 cents per share. Therefore pre-tax income was \$2.5 million, or \$0.05 per share, which is essentially the same as reported for the fiscal third quarter, and up significantly compared to net income of \$0.2 million (\$0.00 per share) reported for the fourth quarter of fiscal 2002.

For the full fiscal year ended June 30, net income was \$11.1 million or \$0.20 per share on a fully diluted basis, including the \$3.0 million, or \$0.05 per share tax benefit. Pre-tax earnings were \$8.2 million or \$0.15 per share, compared to a loss of \$14.8 million, or (\$0.32 per share) reported for fiscal year 2002.

For the second quarter 2003 ended June 30, **Arbitron Inc.**, New York, reported revenue of \$61.4 million, an increase of 8.7 percent over revenue of \$56.5 million during the second quarter of 2002. Net income for the quarter was \$8.0 million, compared with \$6.6 million for the second quarter of 2002. Earnings before interest and taxes (EBIT) for the quarter were \$16.1 million, compared with EBIT of \$15.0 million during the comparable period last year.

Costs and expenses for the second quarter increased by 8.8 percent, from \$44.8 million in 2002 to \$48.8 million in 2003. Interest expense for the quarter declined 26.2 percent, from \$4.3 million in 2002 to \$3.2 million in 2003, due to reductions in debt between the two periods.

Net income per share for the second quarter 2003 increased to \$0.26 (diluted), compared with \$0.22 (diluted) during the comparable period last year. In the second quarter 2003, Arbitron reduced its long-term debt by \$20.0 million to \$135.0 million.

For the six months ended June 30, 2003, revenue was \$132.8 million, an increase of 8.5 percent over the same period last year. Net income for the six months was \$24.1 million or \$0.80 per share (diluted), compared with \$20.9 million or \$0.70 per share (diluted) last year. EBIT was \$46.0 million, compared to \$42.6 million in 2002.

IMS Health, Fairfield, Conn., reported second-quarter diluted earnings per share of \$0.23 on an SEC-reported basis, compared with \$0.21 in the year-earlier period, and \$0.25

per share on an adjusted basis, versus $0.23 in the second quarter of 2002. Revenue for the quarter ended June 30 grew to $337.8 million.

Revenue for the 2003 second quarter totaled $337.8 million, up 11 percent on a reported basis. When calculated on a constant-dollar basis, which eliminates the impact of year-over-year foreign exchange fluctuations, quarterly revenue grew 3 percent from the second quarter of 2002. Operating income was $97.3 million, compared with $94.3 million in the year-earlier quarter, up 3 percent. On an SEC-reported basis, net income for the quarter totaled $55.4 million, compared with $62.0 million in the year-earlier quarter, an 11 percent decline. Adjusted net income totaled $60.4 million, compared with $66.1 million in the 2002 second quarter, a 9 percent decline. Excluding Cognizant Technology Solutions (CTS) results from the year-earlier quarter, adjusted net income from continuing operations was flat. Earnings per share on a diluted basis were $0.23, up 10 percent over the second quarter of 2002. Adjusted diluted earnings per share of $0.25 in the 2003 second quarter increased 9 percent over the year-earlier quarter.

New York-based **NetRatings, Inc.** announced financial results for the second quarter ended June 30. Revenues for the second quarter were $10.2 million, a 40 percent increase over revenues of $7.3 million in the second quarter of 2002, and a 13 percent increase over first quarter 2003 revenues of $9.0 million. In accordance with generally accepted accounting principles (GAAP), net loss for the second quarter was $6.1 million, or ($0.18) per share, on approximately 33.7 million shares. This compares with a net loss of $6.5 million, or ($0.20) per share, in the second quarter of 2002, on approximately 32.6 million shares.

For the quarter ended June 30, Chicago-based **Information Resources, Inc.** reported a net loss of $.2 million or ($0.01) per share. This compares to net income of $.3 million or $0.01 per share for the same period last year. Second quarter results for 2003 include special charges relating to a previously announced reduction in headcount of $2.3 million pre-tax or $0.05 per share compared to special charges relating to restructuring of $1.9 million pre-tax or $0.04 per share in the prior year.

Consolidated revenue of $142.4 million was 2 percent higher than prior year. U.S. revenue was $101.7 million, 3 percent lower than last year, primarily as a result of a 4 percent decline in the retail tracking business, which comprises about 70 percent of the U.S. business. The U.S. panel and analytics business continued to grow, up 6 percent over the second quarter of 2002. International revenue of $40.7 million was 16 percent higher than the

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second quarter of 2002 in U.S. dollar terms, but 2 percent lower in local currencies.

VNU reported its interim financial statement for the first six months of 2003. The firm's marketing information group, which includes ACNielsen, achieved 5 percent organic growth in total revenues in the first half of 2003. However, as a result of the weak U.S. dollar, the group's reported total revenues decreased by 10 percent to EUR 889 million from EUR 989 million in 2002. ACNielsen's organic revenue growth amounted to 6 percent.

The group's operating income decreased by 26 percent to EUR 70 million from EUR 95 million, mainly due to the impact of the devalued U.S. dollar. Income growth was also negatively impacted by product development costs and start-up expenses for the Procter & Gamble contract, which commenced in July 2003, as well as an increase in pension costs. In addition, ACNielsen decided to develop a new version of its Internet-based category management system — Category Business Planner — that will include significant enhancements over the current version. A decision was made to recognize a write-off of the capitalized software costs of the existing application in the amount of EUR 8 million. As a result of the above mentioned items, the operating margin of the group in the first half of 2003 was 7.9 percent (compared with 9.6 percent in 2002).

In the Americas region, the group realized an increase in organic total revenues of more than 5 percent, driven by strong performances in the United States, Canada and Latin America. Organic revenue growth in Europe/Emerging Markets and in Asia Pacific amounted to 5 percent and 2 percent, respectively. In Europe, operating efficiency was further improved as progress was made on the development of a shared service center to streamline transaction accounting and processing.

The VNU marketing information group continued to explore strategic options for two units in Europe — ACNielsen's Customized Research services and Claritas Europe — including possible sale of the businesses.

Organic revenue growth amounted to 4 percent in the first half of 2003, largely driven by the performance of Nielsen Media Research in the United States. However, reported total revenues of this group decreased by 12 percent to EUR 464 million from EUR 529 million due to the weakness of the U.S. dollar.

Nielsen Media Research in the United States grew its organic revenues by 9 percent in the first half of 2003, due to continued demand for its TV ratings and related services. Revenues and operating income declined slightly for Nielsen Media Research International due to overall softness in the global advertising economy.

Results of NetRatings, VNU's 65 percent-owned Internet measurement business, improved significantly. Revenues grew at a double-digit rate, reflecting increased demand and improved business conditions, while operating income improved as a result of greater operating efficiencies and a favorable comparison with 2002, when the company recorded one-time charges totaling EUR 13 million related to restructuring measures and a settlement of patent litigation with Jupiter Media Metrix.

Paris-based **Ipsos** reported revenues for the first half of 2003 of 264.3 million euros, an 8.1 percent increase over the same period in 2002. Growth was driven by three factors. First is the strongly negative exchange rate effects arising from the conversion into euros of Ipsos' revenues in the U.K., North and South America, Asia and the Middle East. On the basis of the exchange rates observed during the first half of 2002, Ipsos' revenues would have risen 23 percent to 301 million euros. Thus exchange rate effects reduced revenues by 15 percent in the first half of 2003. Second is the contribution from companies newly integrated within the scope of consolidation, mostly in the second half of 2002, which generated 13 percent revenue growth. Third is the strong organic growth of 10.1 percent, which was higher than for the market as a whole and for other international research groups.

In the second quarter of 2003, New York research firm **FIND/SVP** reported revenues of $7,063,000, a 35.2 percent improvement compared to revenues of $5,226,000 in the same period in the prior year. The net loss in the second quarter was $104,000 versus a net loss of $186,000, or ($0.02) per share, one year earlier. For the three months ended June 30, the reported net loss attributable to common shareholders' was $251,000 or ($0.02) per share. This is the result of the accretion on redeemable common shares of $147,000 for the three months ended June 30. Adjusted EBITDA in the quarter was $468,000; adjusted EBITDA for the same period in 2002 was $105,000.

For the six-month period, the company reported revenues of $12,165,000, representing an 18.5 percent improvement compared to $10,270,000 in the same period in the prior year. The net loss for the period was $59,000 versus a net loss of $659,000, or ($0.07) per share, in the same period last year. For the six months ended June 30, the reported net loss attributable to common shareholders' was $206,000 or ($0.02) per share. This is the result of the accretion on redeemable common shares of $147,000 for the six months ended June 30. Adjusted EBITDA for the period was $905,000, compared to ($4,000) in the first half of 2002. The reported results for the three- and six-month periods ended June 30 include the effect of the April 1 acquisition of Guideline Research Corporation.

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Product & Service Update

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cream to market from a roster of 10 flavors. TURF analysis can identify the three flavors that, taken together, generate the highest net level of interest (and by implication the highest in-market trial levels) for the total line.

QuestionPro's TURF module includes tools for analysis and simulation. The TURF analysis tools give market researchers one-click access to the "reach" or "coverage" of products and services eliminating duplicates. This is an important step in determining overall market share if there is more than one product in a particular market. The TURF simulator tools allow users to simulate every combination of choices (product or service) to figure out what combination gives them the maximum reach. For more information visit www.questionpro.com.

Web site offers research resources

Stamford, Conn.-based online research firm InsightExpress has partnered with marketing research academics Alvin C. Burns and Ronald F. Bush, authors of Prentice Hall's *Marketing Research: Online Research Applications*, to deliver direct access to marketing research resources via www.insightexpress.com/mrresources. Currently available features include a glossary of market research terms, descriptions of methodologies, and statistical tools to simplify interpretation of results. These resources are also available directly through the desktop using a Microsoft Office XP SmartTag, available at no cost at www.insightexpress.com/ix/insightexpressST.msi.

Claritas upgrades ConsumerPoint software

Claritas Inc., San Diego, has released ConsumerPoint 3.0, an upgrade of its target marketing system. New features include: the Profile Creation Utility, which provides a three-step process for coding a raw customer file, summing by geography to determine the base and creating profiles; the ability to upload and download markets and profiles to and from the Claritas MarketPlace repositories, My MarketPlace Areas and My MarketPlace Profiles, for use in multiple Claritas products, and then sending markets and profiles to other Claritas users. For more information visit www.claritas.com.

New books from Paramount on Boomers, moderating

Paramount Market Publishing, Inc. has released a new book, *After Fifty: How Baby Boomers will Redefine the Mature Market*, edited by Leslie M. Harris, a principal in Boston-based Mature Marketing and Research. Written by nine experts, the book first compares the demographics, lifestyles and attitudes of the Post-World War II generation, leading-edge and trailing-edge Baby Boomers, and Generation X. It then turns to six specific industry categories to explore how each category must respond to the Baby Boomers' redefinition of maturity.

Paramount has also released *Moderating to the Max*, a guide to energizing focus groups and using creative techniques to explore respondents' attitudes and behavior. Authors and moderators Jean Bystedt, Siri Lynn and Deborah Potts take readers through a series of varied techniques to bring depth to focus groups and one-on-one interviews. A special feature of the book gives guidance on when to use different kinds of techniques, depending on the project's objectives. Many of the techniques include examples from the authors' work to show moderators and their clients how participants have responded. Also provided are examples of debriefing, enabling the practitioner to get the most from each tool. For more information visit www.paramountbooks.com or call 888-787-8100.

Mediamark integrates Hispanic-Americans into survey

New York-based Mediamark Research Inc. has begun to use Spanish-speaking interviewers to survey Hispanic/Latino consumers in their homes nationwide, as MRI fully integrates Hispanic-Americans into The Survey of the American Consumer. MRI conducts 26,000 in-home interviews with U.S. adults each year about their media consumption habits and usage of products and services. Until now, the majority of interviews with Hispanic/Latino Americans were conducted in English. Spanish-language interviews were conducted in an ad-hoc manner, if, for example, a relative or neighbor was available to translate.

Now MRI is systematically interviewing the full spectrum of Hispanic/Latino Americans. Several changes to The Survey of the American Consumer have been put in place to support this. All interview support material has been translated into Spanish. MRI is recruiting a bilingual traveling task force to address the issue of interviewing respondents in Spanish-isolated households. In an overwhelming majority of cases, if the Hispanic consumer MRI wishes to interview does not speak English, a bilingual interviewer will be dispatched to conduct the interview in Spanish. Questions relating to language capability and country of origin have been added to the personal interview. In addition, questions that measure viewing of more than 135 Spanish-language television programs — including novelas, specials and sport programs — have been added to MRI's self-administered, in-home questionnaire. For more information visit www.mediamark.com.

Version 4.5 of SmartQuest software

Seattle-based TeleSage, Inc., has released Version 4.5 of its SmartQuest software. SmartQuest 4.5 combines a platform for interactive voice response (IVR) surveys with enhancements to database management and survey organization capabilities, and the product's user interface. A database configuration screen makes the organization of data into multiple databases and the retrieval of information from those databases more efficient. Second, a database error recovery feature now expands and expedites SmartQuest's ability to detect, manage and correct erroneous data. Also, by allowing the user to customize data-viewing options, users can better analyze valuable survey data. To ease development of complex surveys with multiple branched pathways, TeleSage has developed x-ray views and routing diagrams. These features enable survey designers to detect and visually map all the various paths that survey takers might choose, a useful feature for surveys employing complicated skip patterns. The program now has warning prompts to confirm potentially problematic commands and includes new calculation operators and a formula syntax checker to ensure that entered formulas are valid. For more information visit www.telesage.com.

New forms scanner from Pearson NCS

Bloomington, Minn.-based Pearson NCS is now offering a new desktop forms processing scanner. The OpScan iNSIGHT scanner combines optical mark read (OMR) data collection and the flexibility to capture data from images as well as clip and store images such as signatures, short answers and page-long essays electronically.

The OpScan iNSIGHT scanner can do OMR processing using Pearson NCS's ScanTools II software and is plug-and-play compatible with applications designed for OpScan 2 and 4U scanners. The addition of Pearson NCS's Image ScanTools software adds new capabilities. The scanner can capture pencil or ink bubble responses plus images, short answers and essays. Text can be keyed from the images or the images can be clipped, assigned a name or code, and stored electronically with the OMR data for retrieval. Users also have the option to store the entire document electronically. The collection of numeric data can be simplified with the addition of a simple hand print grid. For more information visit www.pearson-ncs.com.

Confirmit now ASP-hosted

Norway-based FIRM has released an ASP-hosted version of its online survey solution, Confirmit 8.0. This will enable users to access new features like the Confirmit Reportal and Confirmit Translator, via the Internet. Confirmit Reportal lets businesses manage all research findings via a single portal. Internal or external clients can view, design and distribute survey data themselves. In addition, Confirmit Reportal enables historical data collected from a variety of sources to be imported alongside the latest real-time insight, letting businesses compare trends. Confirmit Translator has been designed to enable businesses to create and deploy multiple-language surveys from a single applica-

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Six new lifecycle products from Tillman

Tillman Channel Network, Inc., Austin, Texas, has developed six services to help a company examine its lifecycle and its products' lifecycles. NTRForce is designed for product and brand positioning. TrialNet was developed for test marketing. XStream allows for dynamic market entry. FocusVMC is designed to enable successful field marketing, with a concentration on visibility, mind share and credibility. PhoeNX creates the ability to revamp marketing efforts that have been faltering. LAT2 streamlines manufacturing and distribution channels, many times with the goal of lowering overhead and increasing ROI. For more information visit www.tillmanchannelnetwork.com.

Measure ad relevancy online

Bend, Ore.-based RepublicEye has introduced a proprietary online methodology that quantifies the relevancy of creative work by providing the measured reactions of consumers, clients and designers to any type of creative product, from advertising to product packaging. RepublicEye is a self-service, online tool wrapped in an interface driven by proprietary REACTOR technology. The user interface is built around the same application principles as leading graphics software packages. To build a survey, users download the visuals the target audience will view and measure, provide the questions, then determine the demographics (gender, income level and age of survey respondents). The RepublicEye interface enables the management and deployment of surveys in a systematic fashion. Select the survey and the target audience (e-mail list), fill in the properties and hit send. RepublicEye's real-time reporting provides instant respondent data, either crosstab, profile filtered, quantified or initial reaction reports. Data can be exported into several file formats for further analysis. RepublicEye will also provide training on request and build or customize surveys to meet specific needs. For more information visit www.republiceye.com.

Pharma sales force study from G&S

G&S Research, Carmel, Ind., has launched RepReview, a pharmaceutical sales force industry study. To reach the sales representatives, the company will use its partnership with ePocrates (www.epocrates.com), a provider of clinical reference tools for physicians. EPocrates will use its opt-in database of 4,300 sales representatives to recruit participants for the study. The study will combine the opinions of sales representatives from multiple entities and will provide insight into what they think about other companies within the industry. Participants spend between 10 and 15 minutes answering questions using Internet survey technology with a promise from G&S for the strictest confidentiality. G&S will distribute the results without charge to its opt-in database, believing that the data will identify research needs and thus provoke new thought in the area of sales force management. For more information visit www.gs-research.com.

New version of WinCross

The Analytical Group, Inc., Scottsdale, Ariz., has released Version 4.0 of its WinCross crosstabulation software. Flexibility in table formatting and new modules for factor analysis and data entry modules highlight the list of enhancements. The factor analysis module offers the WinCross 4.0 user categorization by similarity in response patterns, known as segmentation. This automated segmentation allows for data value assignments identifying each respondent's group assignment and factor score. Group assignment is useful in determining profiles for marketing campaigns. Slated for future release as a standalone software package, the new Data Entry module is designed around a numeric key pad, offering full data entry and data verification capability, range checking and skip functionality. Users can export data to SPSS, ASCII fixed or comma-delimited data files. For more information visit www.analyticalgroup.com or call 480-483-2700.

Synergistics adds custom research services

In addition to its core syndicated research products, Synergistics Research Corporation, Atlanta, now offers custom research services to address specific business needs or objectives. Custom research projects can be designed on any topic, including, but not limited to: customer satisfaction; product and market share; market and customer trends; brand awareness and performance; and ad tracking. For more information call Andy Brown at 727-391-3631 or at 404-237-3373.

Three new research services from Sage

Matchmaker is a new service from Sage Research aimed at companies that are launching new products or services, are in startup mode preparing to launch their first offering, are testing new vertical markets, or re-focusing branding efforts. With Matchmaker, Sage provides participants for product preview presentations, helps to administer the presentations, assists in gathering the feedback and invites the participants to become beta testers. Sage recruits the participants from the online Sage Panel of more than 10,000 technology decision-makers, who have identified themselves as early adopters.

Sage is also offering Expert Access, an online forum in which vendors are the sponsors, and the experts, on the topic at hand. The participants, recruited from the Sage Panel, are qualified for interest in the topic and any other selected criteria (such as company size, vertical industry or job function). Expert Access facilitates four marketing opportunities in a single format: customer education, market insight, peer communication and brand preference. Expert Access is available as a sole-sponsorship program, or, by request, as a joint-sponsorship.

Sage Research has added a new Case Study program to its market research offerings. In this program, Sage talks to customers and draws from them what makes a product or service so valuable to them — from implementation and training, to ease of use, ROI, productivity gains, and more. Sage recruits the customers, conducts the interviews and writes the case study. Case studies can be conducted by vertical industry, company size and geographical regions. For more information visit www.sageresearch.com or call Doug Haslam at 508-655-5400 x209.

Lightspeed Research launches consumer panel in Australia

Lightspeed Research, Basking Ridge, N.J., in conjunction with Research International Australia, Millward Brown Australia, and Newspoll Ltd., has launched the Lightspeed Consumer Panel Web site in Australia (http://au.lightspeedpanel.com). To join the Web site, Australian residents provide background information by completing the online registration form. During the course of their membership, panelists have the opportunity to participate in online surveys, one-question mini-polls, and brief "Quick Match" survey screeners, which match them to future survey opportunities. Panelists earn automatic entries into the monthly $500 sweepstakes and quarterly $1,000 sweepstakes each time they complete a market research activity. In some instances, they may earn online gift certificates or prizes. The Australian site fully complies with the 10 National Privacy Principles under the Privacy Act 1988. Research International Australia, Millward Brown Australia, and Newspoll Ltd. will initially provide panelists for the site. By the end of 2003, Lightspeed Research expects 20,000 registered panelists. For more information visit www.lightspeedresearch.com.

Briefly...

BIGresearch, Columbus, Ohio, in cooperation with SOS Video, has introduced a new research tool: an **e-mail with an embedded video clip**, which can operate on any platform. Once the e-mail is received, the user opens the e-mail and clicks "play" to see the video presentation, answer the survey questions and submit the response.

The firm has also launched its monthly **Retail Ratings Report**, which is designed to determine consumer retail preferences and provide a scorecard for retail executives, Wall Street analysts and investors. For more information visit www.bigresearch.com.

RFL Communications, Inc., Skokie, Ill., has launched its first industry-specific marketing research publication, *Pharma Market Research Report*, which will report the news, issues, emerging trends, winning strategies and practitioner successes in the pharmaceutical market research industry. The first issue of *Pharma Market Research Report* was published in July and is viewable free at www.rflonline.com.

RDD, Inc., a Portland, Ore., market research company, has opened a **focus group facility in downtown Portland**. The 4,300-square-foot facility is located at 220 N.W. 2nd Ave., Suite 105, on the ground floor of the One Pacific Square building.

Atlanta-based Brain Surgery Worldwide has introduced **Connections Communications Testing**, which offers a quantitative way of evaluating and understanding the emotions surrounding communications platforms, concepts and advertising. For more information visit www.brainsurgeryllc.com.

Field Facts Worldwide has **increased the capacity of its Paris focus group facility** to four rooms from two, in response to continuing demand for city-centered facilities in France. For more information contact Ben Maury at +33-1-53-96-02-10.

New York research firm Ziment has launched a **European online patient panel**, its first foray in the U.K. The panel, started with an initial 45,000 patients, profiles close to 100 different chronic illnesses.

Decision Analyst, Inc., Arlington, Texas, has increased to **14,000 the number of Mexican households** within its global survey panels.

New York-based Arbitron Inc. has opened a **new calling center** in the Southwest, with a capacity of 130 stations.

Millward Brown Spain has launched Kidbus, a **qualitative kids omnibus**, and WebClub, a quarterly study aimed at providing marketers with feedback on the values, habits and entertainment patterns of 8-12-year-olds. The latter has been launched with the cooperation of Fox Kids Europe.

New York-based RoperASW has created a new **Consumer Packaged Goods and Retail Division**. Led by Managing Director Carl Ravitch, the group offers services from product ideation and concept testing through strategy development, tactical feedback and measurement of customer satisfaction and loyalty.

WebSurveyor, Herndon, Va., has introduced **WebSurveyor 4.1**. This latest release advances its reporting and analysis capabilities by introducing cluster reports, which enable decision-makers to create multiple views of survey data with one click. WebSurveyor 4.1 also offers advancements in its analysis and reporting capabilities. For more information visit www.websurveyor.com.

Software Review

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and handle standard reporting and reruns with great ease.

Operationally, it is more like the syntax-based crosstab workhorses like Quantum or Mentor, except there is no syntax: Everything comes from drop-down menus, checkboxes and forms that you complete. For researchers used to working with paper reports, this could provide the best of both worlds in one product.

All of the program's options are available from a series of drop-down menus and a toolbar. Though the program does now work as a native Windows application, the user interface makes little use of the graphical capabilities of the Windows environment and is generally rather text heavy, revealing its DOS origins. However, keyboard shortcuts can make it fairly quick to navigate.

Pick a card

Probably one of the biggest deciders as to whether you are going to love or hate Microtab is its reliance on the 80-column 12-punch binary card as the native model for its data definition. Fortunately, the program is largely variable-based when you define tables, banners or filters. But you are not able to avoid card columns when editing or cleaning your data, and their reappearance when recoding variables or defining weighting seems unnecessarily clumsy. Of course, anyone using paper-based questionnaires marked up for cards and columns will find this old "VX0-9" syntax an advantage, and programming the definitions is fairly simple, though a little tedious. Anyone used to more modern, database-driven or Web-based tools is likely to ask "Is this really necessary?"

To some extent, Microtab's new add-on import module makes this less of a culture shock when importing from most variable-based data collection packages, as it has a full metadata import, transferring variable definitions, names, texts and codes without any need to retype anything. This not only saves a lot of time but eliminates the risk of most common definition errors. Two major import routes take you either straight from SPSS data — a typical export path from CATI or Web interviewing packages — or the more research-friendly triple-s format, which is the growing international standard for trouble-free survey data transfer. Triple-s is supported by CfMC, CI3, Bellview, VOXCO, Snap and Net-MR, amongst others. However, in the background, the program is still chopping up continuous ASCII records into 80-column multicard sets for Microtab to work on, and if you wish to combine data sets, you will have to look up their newly allocated card positions.

Making a clean sweep

The program is very good at taking you through the stages of preparing, cleaning and weighting your data, then producing the tables with the minimum of fuss. It almost assumes that there will be errors in your data and will actively help you to find them. If you are importing data, it will report on any unexpected values or mismatches, rather than fall over or reject the entire file, as other programs are inclined to do. This is particularly helpful if the data have been coded, or additional codes have been added for don't knows and refusals which are not reflected in the record definition you have been sent. The reports produced when importing are clear and very detailed.

Most of the editing functions are to be found in the Columns drop-down menu (which does mean card columns), and these include tools for finding outliers, checking inter-dependency and a range of other clever checks and tests.

The iterative weighting tool is also impressive and unusual in a researcher-oriented program. It lets you define multidimensional target or rim weights, and again provides you with very comprehensive reporting. Such is the horsepower of today's PCs that really complex weighting schemes, requiring multiple iterations to resolve, take just few seconds to close.

With the data defined, cleaned and possibly weighted, it is time to start defining tables. What Microtab refers to as a table, in its Tables menu is, in essence, the stubs. A second set of menu options allows you to define the banners and a third, Reports, is where you bring both banners and tables (i.e., the stubs) together to create the run of tables.

It is here that the range of options available makes most modern, drag-and-drop online tab tools look lightweight. You can fine-tune the presentation of values, define nets and subnets and even vary the percentaging

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and indexing of values on a row-by-row basis. Sometimes the options are a bit fiddly to perform. New net lines, for instance, always appear at the bottom of the variable, and have to be nudged up into position by clicking the arrow key several times. The dialog for defining banner headers too could be made more user friendly if it responded to drag-and-drop instead of a strange combination of mouse clicks and the arrow key again.

Cranking out the tables

Ireland Consulting Group provides boutique research-based consulting and planning services to both businesses and not-for-profit organizations in and around North and South Carolina. "Working as we often do in the social services arena means producing results for people who are not researchers and need information to be presented in a very clear and easy to understand way. My goal is to make their life easier and not confound them with numbers," says Gayle Ireland, the company's president.

Ireland and her team achieve this through what she describes as the "ideal" combination of SPSS and Microtab, which she considers very complementary in their functionality. Charts and more advanced statistics are carried out in SPSS, but the tables are achieved more quickly and easily in Microtab. "With Microtab, you hit the report button and in a matter of seconds it has cranked out 60 tables. It uses a lot less paper than SPSS. Microtab really cuts the analysis time down. On a typical job, I can produce all the analysis for the report in two to three hours."

Its strength is its versatility

Microtab has been cranking out the reports for some 10 years at Houston-based Creative Consumer Research. According to Tracy Cryer, who manages the firm's computer department, the software's strength is its versatility. Today, the majority of projects arrive in SPSS format, from studies collected in CI3 and other interviewing packages, which are imported directly into Microtab, complete with all of the definitions and labels. Yet the program's versatility remains an attraction, with the definition and layout of tables.

"I have pulled some pretty good maneuvering with the program over the years to get tables into some interesting formats and merging data from different sources. I think we have used pretty much every table facility there is. You do have to pay attention to what you are doing, but so far, I have not run into anything I have not been able to create," Cryer says.

Both users commented on how useful and reassuring the error reporting facilities are, as they speed up the cleaning processes, Ireland says. "[Microtab] provides good, idiot-proof tools. In the frantic pace of trying to meet a deadline you can overlook these things and you live in fear of having sent the wrong message or conclusions to the client. Any aids to makes my life easier in that respect are welcome."

By the Numbers

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found that it successfully delivered clean bathrooms 99.6 percent of the time. To monitor their continued success, rather than survey 10,000 people to get back 1,000 surveys four weeks later, of which four would have bathroom complaints, the chain chose to put a sticker in the bathroom and on the room desk highlighting the guest services hotline. Customers' call rates would let the chain know if quality had slipped.

Are you answering a question your colleague answered yesterday?

The second instance of resource waste is when research is used to gather information already available from other internal data sources. A major home repair services company was spending millions of dollars surveying customers to see if the repairman showed up on time. However, the company's call center tracked data on exactly how many times customers had phoned to complain about repairmen who were late or no-shows. For high involvement issues like a home visit, 90 percent of consumers will call if the repairperson is not there at the appointed hour. Why survey to gather data you already have?

If a company has detailed or continuous inspection of its deliverables, then surveying is both untimely and less accurate than these other sources. For example, a bank was surveying customers on their satisfaction with the uptime of the ATMs. However, the bank already had internal IT metrics that measured ATM uptime to four decimal places. In another example, a bank was monitoring five calls per month for all 300 reps in a call center, a total of 1,500 observations per month. Additionally, it was fielding a random survey of a sample of 300 calls per month, trying to determine if the reps were using the consumer's name and a series of other operational dimensions. While the survey can give good data on the overall impact of the call center on customer satisfaction, the call monitoring data will give much more timely and actionable information on which types of calls are being handled best and where improvements are needed. The survey cannot provide much in the way of diagnostics beyond a very macro level.

Use them intelligently

So, is the answer to discontinue surveys? Not at all; just use them intelligently to do what they do best: identify dissatisfaction.

Some recommendations:

1. If you execute eight out of 10 transactions excellently, don't do a random sample of all transactions. Focus your survey on those transactions that you do poorly and periodically sample the rest. Neiman Marcus Direct generally gives great telephone customer service but it has found that there are two types of transactions that are challenging. It specifically surveys customers each month who require those types of transactions to see if the company is improving its performance while surveying a much smaller sample of the rest of the callers.

2. Make sure the data doesn't already exist. We have found that departments often operate in silos, unaware of the research being done or data being collected by their co-workers. Sharing existing research and internal metrics not only gives immediate access to actionable data but does so without incurring the costs of conducting surveys.

3. Ask other departments what data they have describing the customer experience and use their data to track improvement. Use a survey to show the impact of the improvement. At MacKenzie Financial, a survey identified several opportunities to improve client satisfaction. Each operations area then took action, including identifying existing metrics that described the company's daily success at delivering quality service. Research was then used to confirm the result of the actions: a double-digit improvement in client satisfaction and loyalty.

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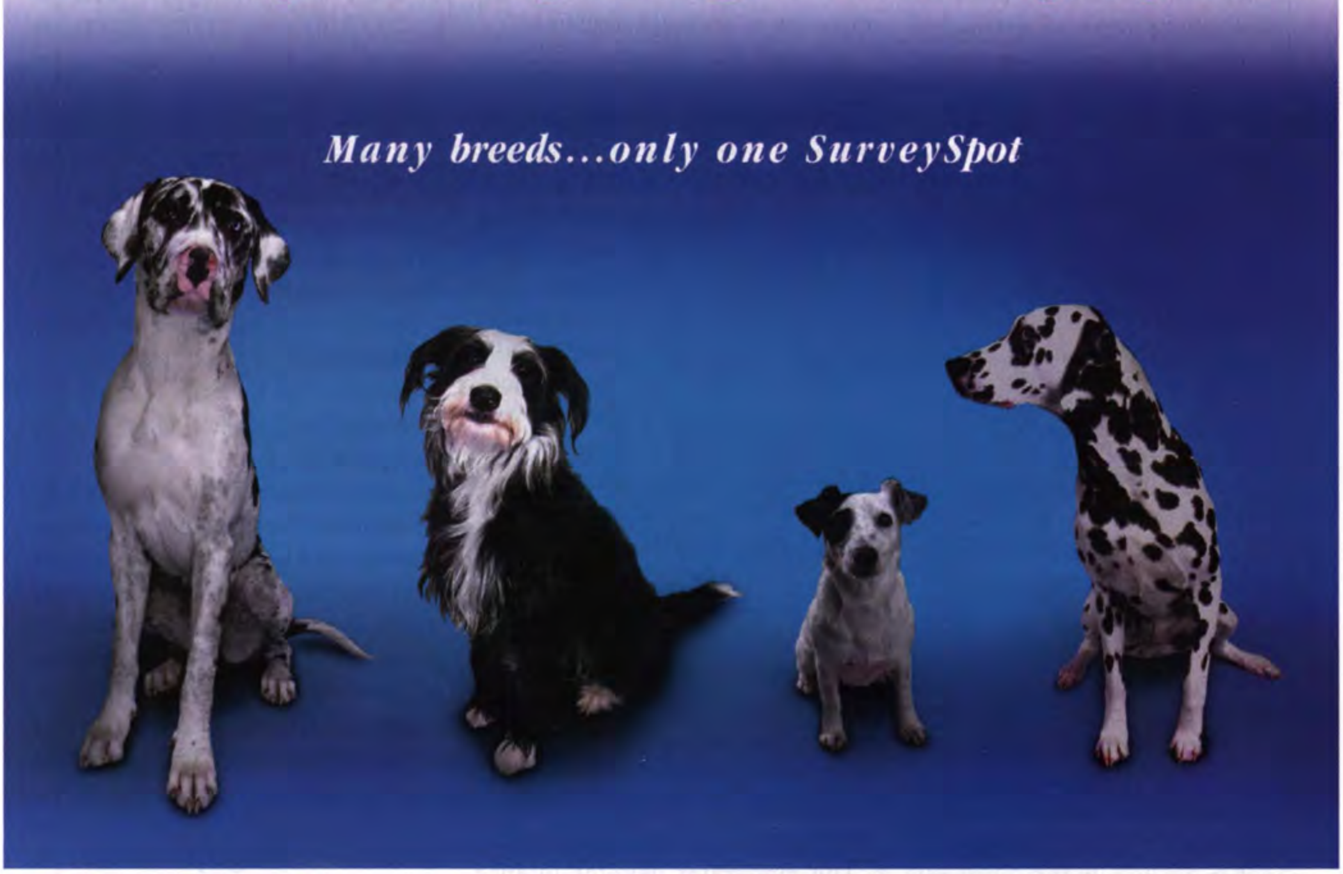

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Qualitatively Speaking

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accepted form of marketing research. In 2002 there were an estimated 245,000 focus groups and equivalent IDI sessions conducted outside the U.S. throughout Europe, Latin America and Asia-Pacific. This makes a worldwide total of 463,000 sessions.

Usage has thrived during good economic times, but has also endured through advertising and marketing recessions, general economic malaise and threat of war.

Enduring popularity

With all the criticism, what accounts for the enduring popularity, acceptance and growth of qualitative research? Following are some reasons.

Focus research is the only formal research methodology that allows clients to experience the real, live customer and prospect. In the end, purchasing decisions are the result of complex psychological workings which can only be explored through open discussion with the consumer. Every other research methodology provides only a numerical representation of such actions.

But that may be part of the problem. Qualitative research exists in the realm of psychology and requires the researcher to draw conclusions based on subjective information, while the decisions to be made from quantitative results tend to be more self-evident.

Qualitative research can provide intimate understanding and valuable insight about the customer not attainable through other research methods. It is uniquely appropriate to determine how products and services fit into the living pattern, mindset, vocabulary and emotional needs of the customer.

Qualitative research is singularly qualified to fuel and feed the intuition and beliefs of management about the consumer. It allows management to make intuitive leaps to better ways of satisfying and communicating with consumers. Managers can more confidently chart a course where no statistical roadmap is available. There is recognition that valuable insights are just as valid and important as accurate statistics.

Some of the "dangers" of focus research are addressed and neutralized through responsible management and execution of research projects. Experience indicates that most clients are sophisticated in their use of qualitative research. Just as they are obligated to learn to use other tools in marketing and marketing research, part of their job is to take advantage of this important methodology and apply it effectively and responsibly. Blue-chip marketers simply do not tolerate incorrect use or abuse of focus research.

The moderator plays a key role in ensuring that the research is applied and used appropriately. He or she has stewardship of the project, not just in running the groups, but also in project planning, crystallizing objectives, counseling throughout to sharpen the process, reviewing and synthesizing results, and providing an objective interpretive report.

The moderator devotes intense undivided attention to a project from beginning to end in a concentrated time period. Her skills, training and experience are applied throughout to optimize results for the clients and avoid abuse or misuse.

Maximum benefit

Attendance at, and observation of, qualitative research is considered a must by most practitioners to get the maximum benefit from the focus research experience. This goes beyond just listening to content and observing body language. Group dynamics and respondents' individual expressions communicate a great deal to moderator and clients.

There have been efforts — lately applying Internet technology — to speed up the process of or cut costs for qualitative research. These include chat sessions, bulletin boards, qualitative/quantitative combinations and others. Each may find a useful market position with advantages of its own, but so far, none has caught on as a replacement for the traditional focus group or IDI. One reason for the resistance is that each of these methodologies, in their attempts to gain easier access to respondents, results in a reducing or stamping out of the visual and verbal interactive elements that are the strength of focus research. That is, the opportunity to experience the consumer in the flesh in a way that will expose the psychology of their decision-making.

Some new technologies have been accepted. But they are those that aim to preserve the integrity and unique characteristics of the focus research environment, and then make the intact experience more accessible to client users. These include the video-transmission technologies of video-conferencing and videostreaming, which keep the moderator, participants and focus facility components in place while providing a technological overlay to permit clients to see, hear and interact without leaving office or home. The growing use of these technologies demonstrate that clients remain highly interested in hearing what the consumer has to say, even though they are less able or willing to travel to attend in person.

Know the customer

Today's corporate culture demands that marketing and advertising personnel know the customer, not as a numerical average, but in all their subtleties, aspirations and motivations. In his keynote address to the Advertising Research Foundation Conference in 1998, Robert L. Wehling, senior vice president of global marketing and consumer knowledge at The Procter & Gamble Company, issued the following corporate mandate to researchers: "Know the individual consumer's heart and you will own the future! Get to know this changing consumer personally. Not as an average but as a person."

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Data Use

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require reasonably sophisticated statistical training on each technique. However, the skilled marketing consultant can help even the least technically sophisticated client understand and incorporate the results into their business strategies.

Several methodological dilemmas are created by not utilizing multiple data analytic techniques. First, traditional consumer segments, such as income groups, created by the client may not be as useful for interpreting the business outcome or may not be as meaningful — in the larger picture — as the client believes them to be. Second, within segments there often exist hierarchies that impact business outcomes. For example, financial institutions tend to focus on those clients with the largest revenue potential, though not necessarily providing the largest share of wallet. Many of the "smaller" clients often complain of being treated as if they are not important. However, feedback from clients suggests that a restructuring of the hierarchy so that the clients with less revenue potential are treated like clients with more revenue potential would yield a higher share of wallet percentage for the financial institution. Third, all consumers belong to multiple segments, which makes distinction for purposes of analyses difficult. Additionally, reciprocal relationships are often not considered and every relationship is considered to be linear. Thus, a number of multivariate data mining and exploration techniques will be discussed. While there are techniques that are not listed here, we have chosen to focus on those techniques that can be used for pattern detection.

Latent factor modeling

Latent class analyses make it possible to characterize latent relationships in the data by the crosstabulation of multiple categorical variables. Latent class analysis is the categorical variable analog to the more traditionally used factor analysis. However, one advantage over traditional factor analyses is that variables may be continuous, categorical (nominal or ordinal), counts, or any combination of these. This procedure allows for the identification of a set of mutually exclusive latent classes that account for the distribution of consumers. Thus, one important use of latent class analyses is for the analysis of consumer typologies, either as a method for empirically characterizing a set of latent consumer types within a set of observed indicators or as a method for testing whether a theoretically posited typology adequately represents the data. For example, if we enter categorical data on multiple segments of the consumer group, such as major aspects of the business, along with more traditional segments, such as income and gender, we may find that there is one latent variable (e.g., face-to-face customer service) with a number of different, clearly described latent classes (i.e., high-income women who are satisfied with their face-to-face customer service or low-income men who are not satisfied with their face-to-face customer service). Alternatively, perhaps there are multiple latent variables that explain the relationship (e.g., face-to-face customer service vs. telephone customer service, vs. online customer service). A latent class analysis might suggest that there is a process that has not been explicitly captured in the survey, in addition to providing information on how this process differs for various population segments. Some marketing applications of latent class analysis include:

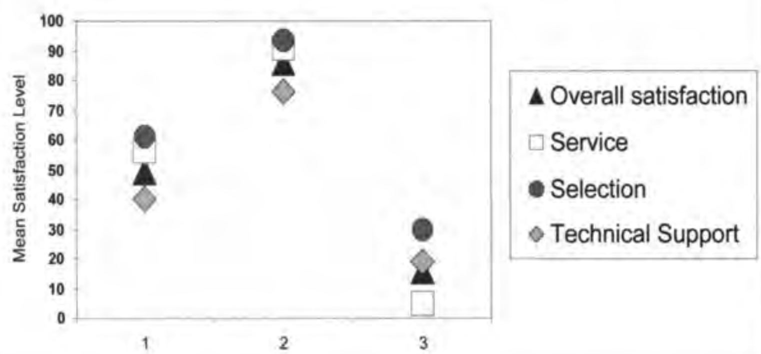
- identifying consumer typologies;
- identifying latent classes that explain heterogeneity within the data;
- identifying determinants of customer satisfaction that are relevant to distinct customer segments; and
- developing composite variables from attitudinal survey items.

Clustering procedures

Clustering procedures are a type of relational model, one that does not assume a predictive outcome but rather investigates the relationship between all the variables. Clustering procedures are truly multivariate. For example, in client satisfaction research, we often ask a number of overall questions related to major aspects of the client's business. Ideally, we would hope for three cluster segments: one in which consumers have all high scores on all major aspects of the business, one in which consumers

Figure 1

A drop-line graph is often used to demonstrate the differences within and across clusters. In this example we have three distinct clusters, where consumers in the first cluster have mediocre scores on all major aspects of business, consumers in the second cluster have high scores, and consumers in the third cluster have low scores. Based on these results you can interpret which group needs improvements in which area. For instance, you can advocate that in order to improve satisfaction within cluster three the client needs to focus on improving service.

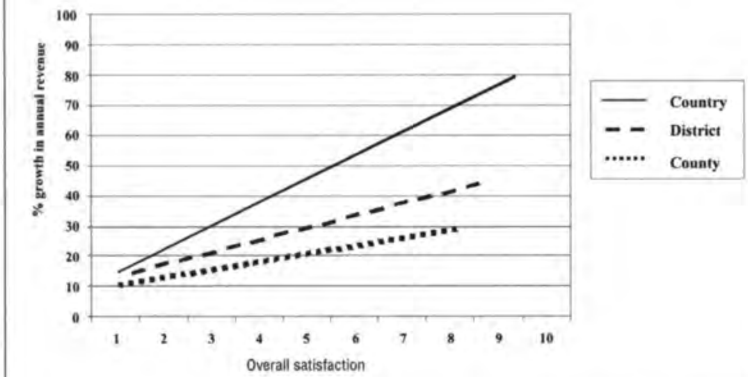


have all low scores, and one in which consumers have all mediocre scores. In this simplistic example, with clustering procedures, it becomes easy for the client to identify the consumers it should on moving up the satisfaction continuum, from low scores to mediocre scores, and the consumers it should focus on moving from mediocre scores to high scores).

One advantage to using cluster analysis is that the procedure does not begin with *a priori* well-defined segments and ask how they differ. Rather, it begins with undifferentiated segments and asks whether a given group can be empirically partitioned into segments that differ in some meaningful way. Cluster analyses are considered exploratory tools for describing, in terms of the data collected, the segment to which its members belong. Because cluster analyses make no assumptions about how segments are formed, the results may contribute to the definition of a formal classification scheme that is more meaningful than the pre-determined segments that are typically analyzed, suggest patterns with which to describe populations, indicate rules for assigning new consumers to segments for identification or diagnostic purposes, provide measures of definition change in what previously were only broad concepts, or find profile exemplars to represent a segment.

Figure 2

Multilevel models allow us to examine the impact consumers have on the business. The example below represents the relationship between overall satisfaction and percent growth in annual revenue for a fast-food chain across three levels of observations: country, county and district. The graph displays the differences between inherent hierarchies that exist within the data. It is evident that at high levels of satisfaction, country, county and district show marked growth in revenue, with country showing the most growth and district showing the least. However, at low levels of satisfaction there is virtually no difference in revenue growth, indicating the importance of moving the consumer from the dissatisfied range to delight.



Multilevel modeling

Because consumer segments are inherently hierarchical or take on a hierarchical quality based on business outcomes, it is important for analyses to address the hierarchical structure. In other words, the existence of data hierarchies is neither accidental nor ignorable. Segments differ, with this differentiation being mirrored in various business outcomes (i.e., profitability, retention, etc.) where the outcome is often a direct result of differences between consumer segments. In other situations, the segments may be more arbitrarily constructed, such as the assignment of consumers to the local office, whereby in many instances consumers with similar demographic backgrounds live in that area. In this situation, an analysis of difference based merely on location would not be very telling. However, once segments are established, they tend to become differentiated, the differentiation implying that one group is empirically different from another. Multilevel models take into account the oftentimes hierarchical ordering of segments. Furthermore, multilevel models need not only model linear relationships. For example, in customer satisfaction research, we are not only interested in individual consumers but also in the aggregate unit, such as clients, stores, districts, regions, etc. Typically, we would investigate the individual-level effects and, in a separate analysis, investigate the aggregate-level effects. However, multilevel models allow us to understand the influence that an individual consumer exerts on the aggregate to impact the business outcome. Additionally, the ability to create cross-classification of segments in multi-level models helps to deal with the fuzzy borders of segments by recognizing that for various reasons, people may switch segments over their lifespan.

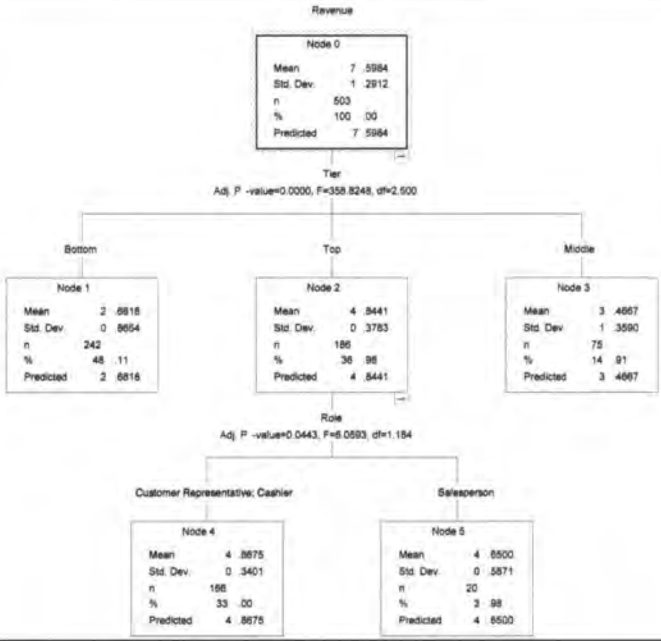
Automatic interaction detection modeling

Chi-square automatic interaction detection (CHAID) is based upon the methodology of automatic interaction detection (AID) — a family of methods for handling regression-type data in a way that is robust to assumptions of linear hypothesis methods. Because CHAID only looks for interactions, it is a useful tool for analyzing multiple variables that are not easily extricable from each other (e.g., the different forums for customer service or different industries). Although CHAID is typically used in marketing data for population segmentation studies, it is one of the most powerful procedures for handling fixed-response questions that typically yield either metric or nonmetric responses.

CHAID is an exploratory procedure that attempts to identify and analyze the complex relationships that may be imbedded in higher-order contingency tables by partitioning a contingency table produced from the crosstabulation of three or more variables. It does this partitioning by determining the smallest number of group splits based on significance of the group as a predictor. It then looks at the subcategories within groups as suitable predictors and continues to partition in this manner until no further suitable predictors are found. For example, a CHAID analysis may indicate that tier (an importance categorization), role (job function) and industry (business function)

Figure 3

The CHAID decision tree is the primary tool for interpreting the results of the CHAID analysis. The "trunk" of the tree represents the dependent variable that you are studying. The subsequent branches indicate which variables are the strongest predictors of the dependent variable. According to the tree below, "Tier" (a measure of the importance the company assigns to the customer) is the best predictor of the revenue the customer generates for the company. "Role" is the second best predictor of revenue, but only for those customers who are in the top tier.



are significant predictors of a client's revenue, with high-tier clients (more important clients) yielding a larger revenue percentage. However, within each of the high-revenue groups perhaps only tier and role are significant predictors and within the low-revenue groups, perhaps only industry is a significant predictor. Upon further investigation, within the low-revenue group, we may find that in certain industries, particular roles are significant predictors of revenue while others are not. This type of interaction analysis allows for further investigation into how multiple variables interact with each other to influence business outcomes and to create multiple profiles for potential business outcomes.

Curvilinear regression

Conventional linear regression assumes a linear relationship between the predictor and the outcome. That is, a straight line can best describe the relationship. To the extent that nonlinear relationships are present, conventional regression analyses will underestimate the predictor-outcome relationship. In marketing, we often have data in which the outcome can't be predicted by a straight line. Instead, the relationship may be curvilinear. In conventional regression analyses, a partial residual plot or a component-plus-residual plot can highlight curvature of the data and illustrate non-linearities. When a curvilinear relationship exists in the data, we can fit a power polynomial to the data, the exact form of which will depend on the number of bends in the curve. Making sense of curvilinear trends depends upon whether or not a substantive explanation can be applied to a higher order relationship based on theory. For example, if we think there is one bend in the curve describing the relationship between the predictor and outcome, we'd fit a quadratic model to the data as shown in Figure 4. Consider the inverted U-theory of research and development expenditures. At the extreme — that is, high percentages and low percentages of competition — sales decrease, whereas, at moderate levels of competition, sales and expenditures are at the highest levels.

Curvilinear regression analysis is carried out hierarchically. We start with the linear model and then add progressively higher order terms on successive steps (x, x^2, x^3, etc.) If a term produces a significant change in R^2 over and above all lower order terms, we can say that the type of curvilinear relationship it represents does describe the data. Additionally, there may be multiple trends such that it may be possible to describe the relationship between the predictor and the outcome with both linear and curvilinear relationships. For example, Tim Keiningham and Terry Vavra, authors of *The Delight Principle: Exceeding Customers' Expectations for Bottom-*

Figure 4

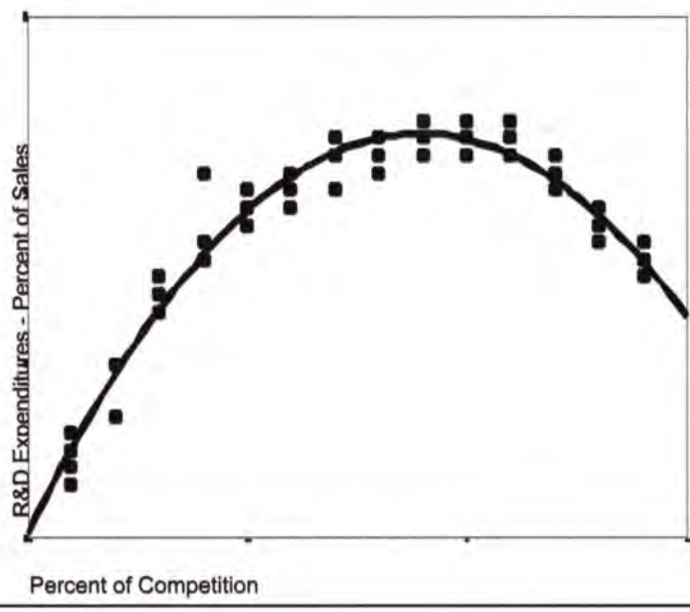


Figure 5

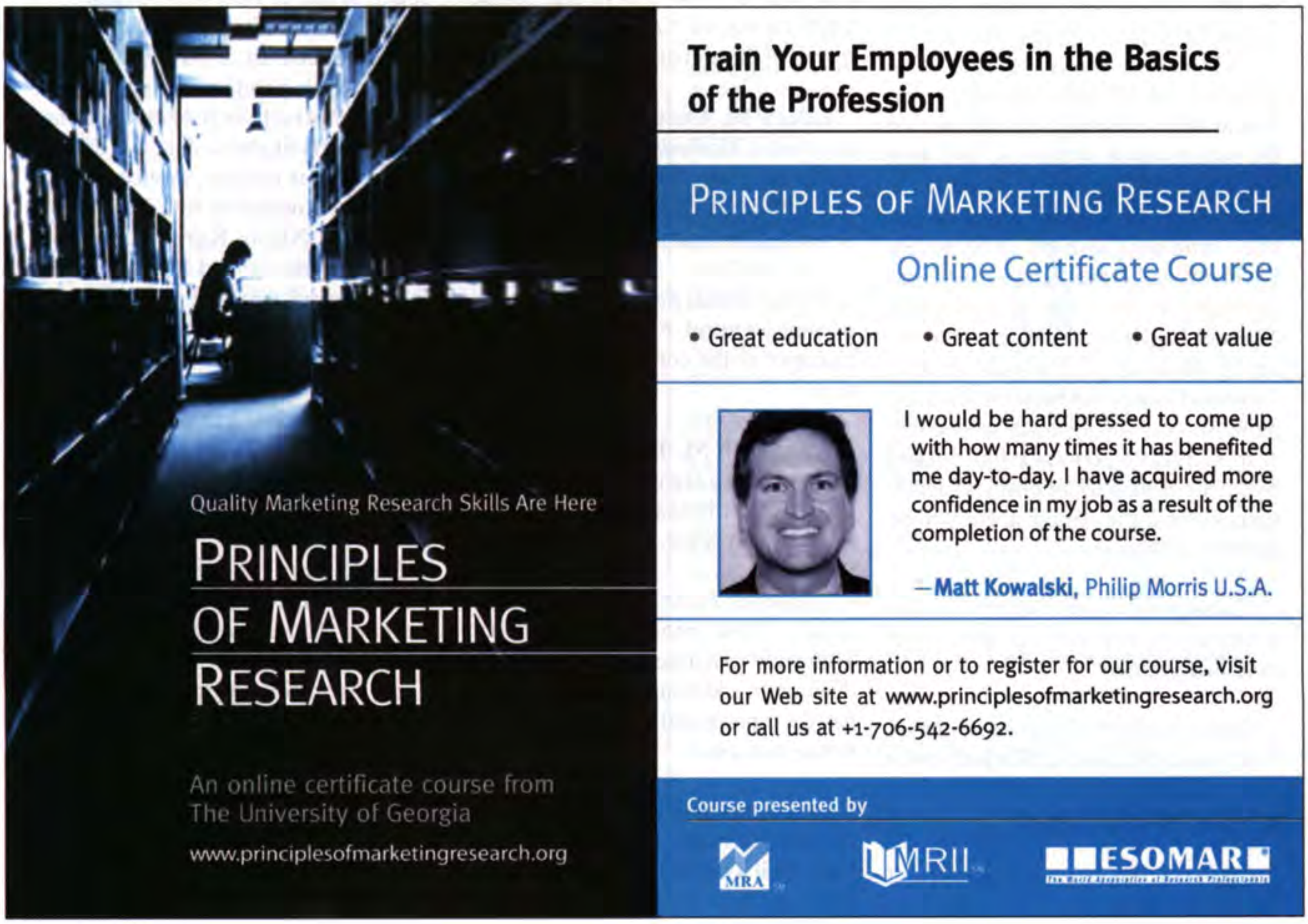
Source: Timothy L. Keiningham and Terry Vavra (2001) ***The Customer Delight Principle: Exceeding Customers' Expectations for Bottom-Line Success***. McGraw-Hill.

Line Success, have illustrated this effect. As clients move up the satisfaction continuum from extreme dissatisfaction to a more satisfied state, there is a marked increase in satisfaction, after which point profits plateau until the clients reach an extremely satisfied state, at which point profits again begin to soar.

Methodological and practical implications

The multivariate exploration and mining techniques mentioned above can be extremely useful for extracting additional information from your data and identifying patterns in the data in almost any research situation. The purpose of this article was not to provide an exhaustive list but rather to illustrate some of the business issues that can be addressed by utilizing various multivariate exploration and mining methodologies.

What are the implications of using multivariate exploration and mining techniques for analyzing business outcomes? The primary implication is that understanding the complex interrelationships among major aspects of the client's business, demographics and other client-defined segmentations requires a level of specificity that multivariate statistical models can accommodate and explain. Second, in a cross-sectional design, it is difficult to determine the static and/or dynamic nature of business outcomes. Therefore, attempts must be made not only to uncover profiles and patterns at a specific point in time, but also to ultimately examine changes to profiles and patterns over the lifespan. Finally, the incorporation of all relevant variables into a unified multivariate analysis will appropriately address the evolving nature of consumer and client needs, expectations and business outcomes.



Names of Note

continued from p. 10

senior-vice president of advertiser/agency sales and third party ventures, resigned from MRI in June to pursue new opportunities. In another promotion, **Risa Becker** moves from director of research operations to vice president of research operations.

C&R Research, Chicago, has promoted **Hillary Christopher**, **Janice Wakeley** and **Lisa Hutto** to the position of research director.

London-based *TNS* has named **David Corless** as chief financial officer, North America. In addition, **Elaine Riddell** has been named C.E.O. of TNS' Worldwide Healthcare Division.

Tamara Ingram has joined *Kantar, WPP's* Insight, Information And Consultancy Division. She will be president of insight companies *Added Value, Fusion 5* and *Henley Centre*.

Synovate has announced a number of hires and promotions. **Gustavo Alvarez** has been named vice president, regional business development director for Latin America; **David Myhrer**, vice president for *Synovate Motoresearch*; **Leslie Yee**, senior account director for the eastern region of the U.S.; and **Alex Spencer**, vice president of sales for ViewsCast. **Deborah Gonderil** has been promoted to head of Synovate Diversity, and **Dave Schafer** has been promoted to Synovate's IT director. **Manuel Lopes** has been named managing director of *Synovate Brazil*. **Antonio Gomez** has been named managing director of *Synovate Argentina*. And **Gustavo Alvarez** has joined Synovate as director of business development for Latin America. He will be based in Miami.

Philadelphia-based *Focus Pointe* has promoted **Shawn Gore** to director of field management.

Target Research Group Inc., Nanuet, N.Y., has named **Jon A. Mitchell** senior vice president. He will operate an office in Kennebunkport, Maine.

Charles Battista has joined *MarketVision Research*, Cincinnati, as vice president. He will lead MarketVision's client service office in Dallas.

Toronto-based *Telepoll Canada* has named **Sarah Greenberg** director of sales and business development.

Dominick Messineo has been named president of *Schrader Research & Rating Service*, Cranbury, N.J.

NFO WorldGroup has named **Jeni Lee Chapman** vice president, international research champion to oversee the company's North American international research center.

Seattle-based *NetReflector, Inc.* has named **Paul McIntyre** managing director of NetReflector Europe, Ltd., based in Newbury, U.K.

Mary McIlrath has joined *C&R Research*, Chicago, as director of qualitative youth services.

NOP World has named **Jim Follett** chief operating officer. Separately, **William "Jay" Wilson**, executive chairman of *NOP World* and former CEO of *Roper Starch Worldwide*, retired at the end of August.

Laura M. Cusumano has joined *Integrated Marketing Associates LLC*, as director of strategy and business development. IMA is a marketing research firm located in Bryn Mawr, Pa.

Market Trends Research, Seattle, has named **Samuel Fleishman** project manager in the consumer goods division.

Elizabeth M. Tucker has joined *Landis Strategy & Innovation*, Palm Beach Gardens, Fla., as account director.

Consumer Pulse, Inc., Birmingham, Mich., has promoted **Jennifer Killewald** to marketing and operations director. In addition, **Caroline Thomas** has been promoted to director of marketing services.

Cincinnati-based *MRSI* (Marketing Research Services Inc.) has welcomed back **Neil Gartner** as vice president, client services. Gartner was previously with MRSI from 1985 to 1990.

NetRatings, Inc., New York, has named **Robert Leathern** Nielsen//NetRatings Commerce Analytics group director and senior analyst.

TNS has appointed **James Hall** managing director, Asia Pacific. Separately, **Kym Penhall**, director for the TNS branded solutions MarketWhys and Miriad, has relocated to the U.K.

L.C. Williams & Associates, a Chicago public relations and research firm, has named **Jaci Kotzum** assistant account executive.

Debi Wyrick has been promoted to vice president at *Burke, Inc.*, Cincinnati.

Walker Information, Indianapolis, has announced a number of promotions: **David Scott** to vice president of relationship management in client services; **Kyle Martin** to director 2, IT project management; **Brian Lyle** to database analyst 3; **David Walker** to LAN administrator 1; **Melissa Ward** to coder; **Jennifer Bostwick** to IT project coordinator; **Jeffrey Strance** to LAN support specialist 2; **Mike Pinger** to senior Web production specialist; **Christi Marsch** to programmer/analyst 1; **Chris Shobe** to database analyst 3; **Lisa Hizer** to client service director 3; **Krista Roseberry** to client service director 2; **Nicole Karmire** to client service director 1; and **Kristen Bailey** to client service project director 2. The firm also announced a number of new hires: **Elizabeth Paul** and **Megan Sanders** as project directors; **Steve Sion** as vice president of loyalty management; **Stephanie Mayes** as graphics and reporting specialist 1; and **David Bunner** as database analyst 1.

Raúl Lopez has been named president and chief operating officer of *Cultural Access Group*, Los Angeles, having served as interim president and chief operating officer since May. **Michele Valdovinos** has joined the firm as director of research.

Jim Kelley has been named chief operations officer of *Tillman Channel Network, Inc.*, an Austin, Texas research firm.

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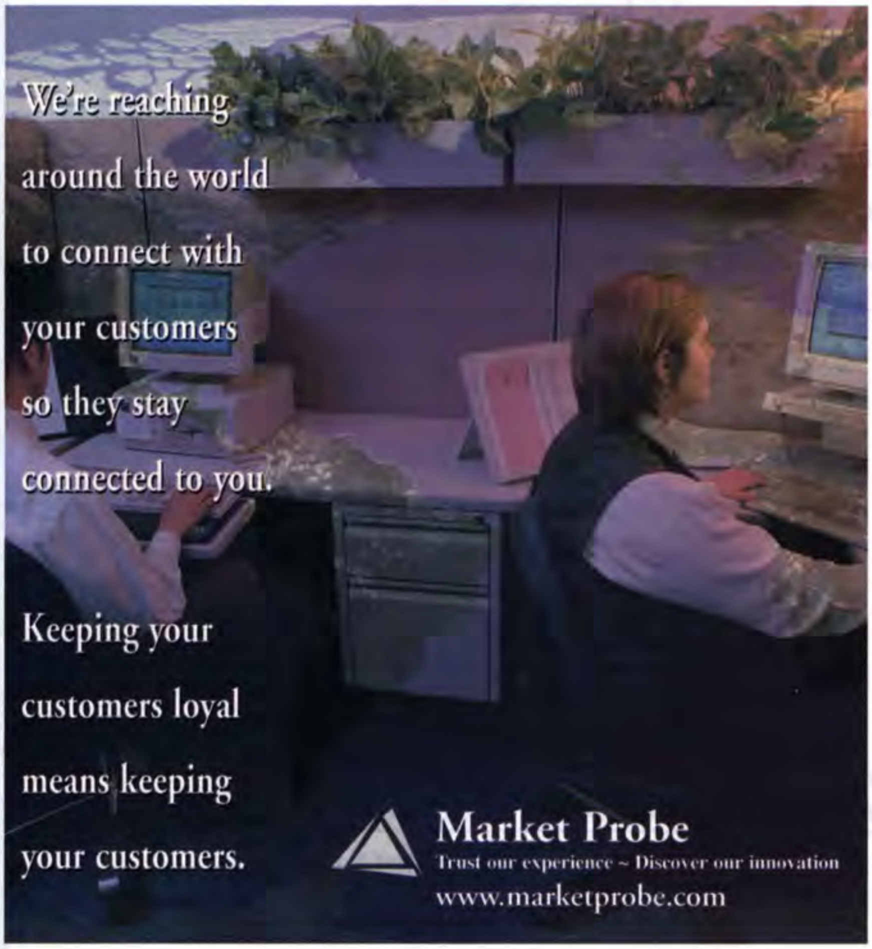

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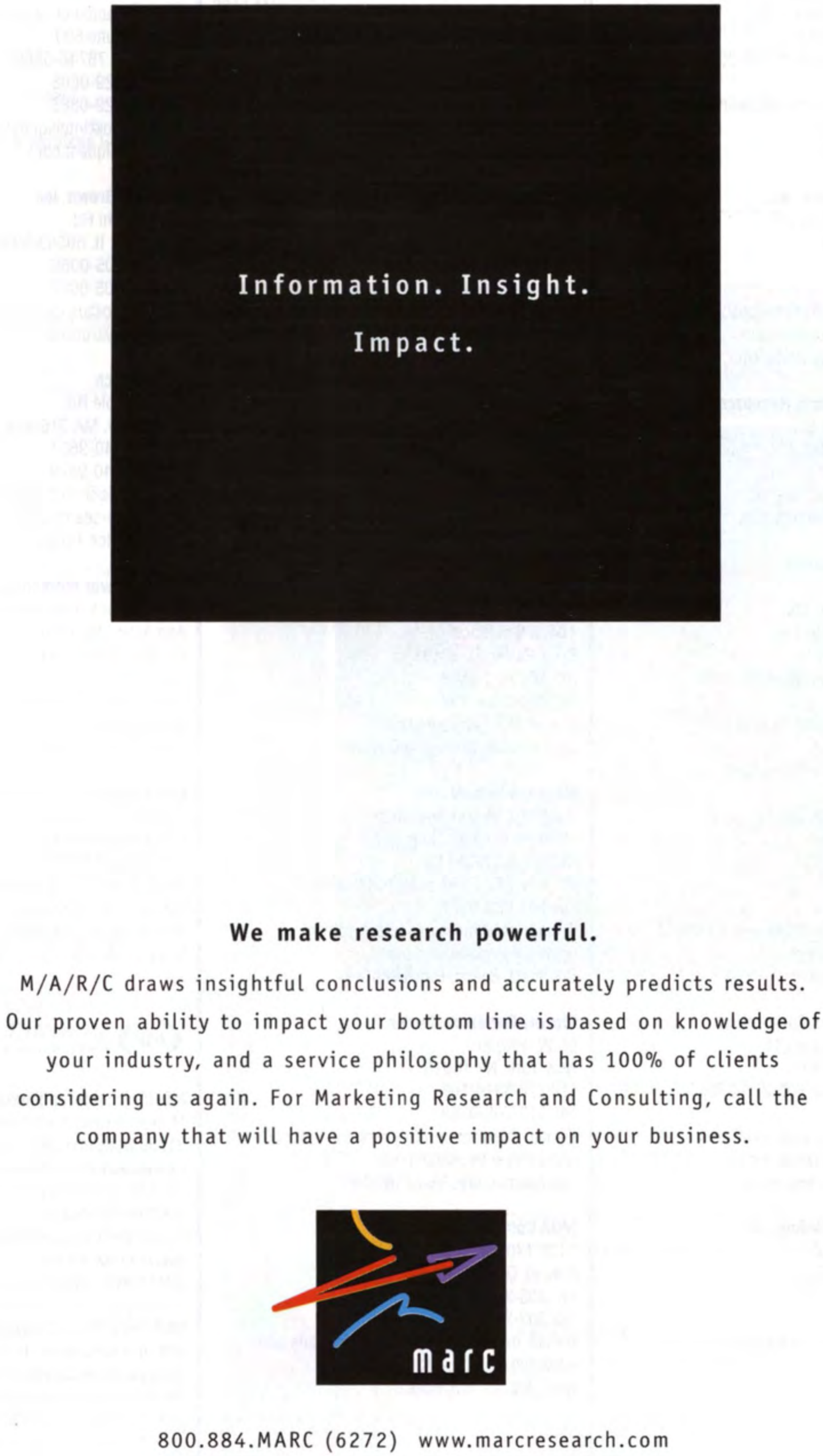
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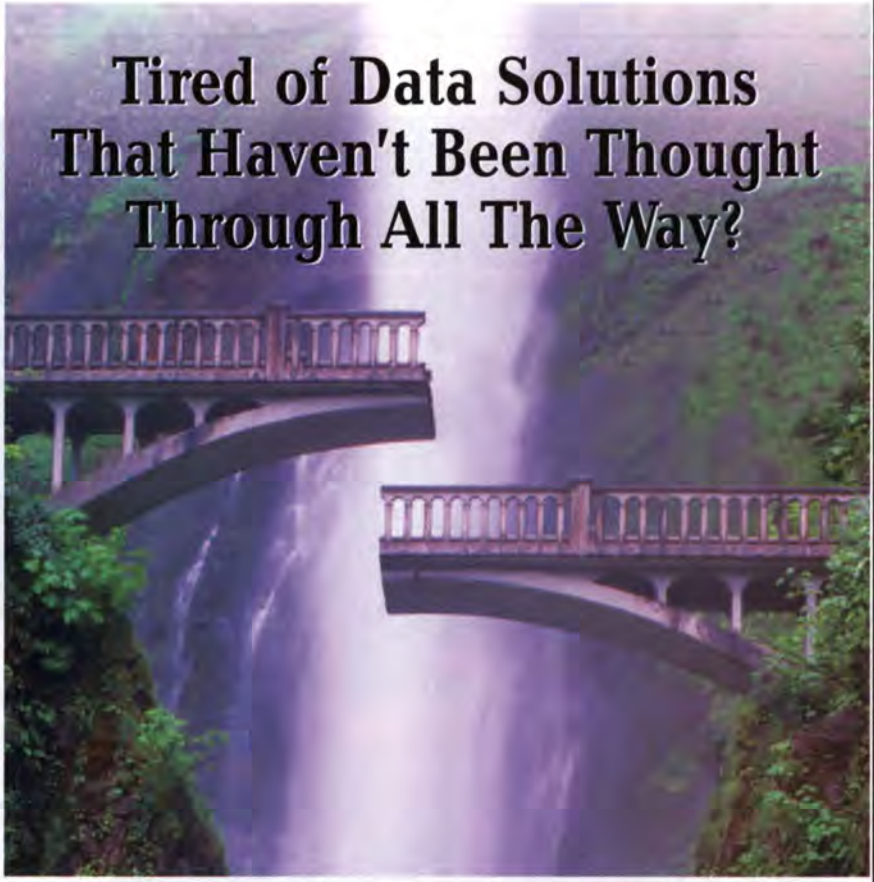

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Letters

Are e-mail survey invitations spam?

In regard to the article "Persuasive e-mail invitations" [July/August], I think that author Bill MacElroy provides a number of very valuable ways to increase online survey response rates.

However, I believe that in Step 9 he incorrectly creates the impression that e-mail survey invitations are, in a legal sense, spam. To the contrary, the state laws I've reviewed clearly state that they apply to commercial advertising material. To quote from the California law, no person or business shall e-mail "documents consisting of unsolicited advertising material for the lease, sale, rental, gift offer, or other disposition of any realty, goods, services…"

From a customer relations standpoint, it makes absolute sense to include opt-out options and the like. From a legal standpoint, though, I don't believe it is required for market researchers.

Lewis Copulsky
President
Lewis & Clark Research
Raleigh, N.C.

Bill MacElroy replies:

Thank you for your feedback. I would like to offer the following reply, if I may.

Many researchers believe that various laws regarding direct marketing and general commerce do not specifically apply to "survey work." Many research agencies run sweepstakes-style incentives and no one can point to instances where an agency has been brought to court over these activities — which would be prohibited if a product advertisement were involved. Similarly, there are many who believe that by denying that "transactional elements" are involved with e-mail recruitment to Web surveys, such e-mails escape the existing state (and soon to be federal) spam laws.

I believe (as do most members of the Interactive Marketing Research Organization [IMRO]), however, that if a broadcast e-mail contains an offer of an incentive (or sweepstakes) for taking a product or service survey, a quid pro quo situation arises. We are, in fact, advertising payment for a commercial service that we are providing.

If people wish to skate on this thin ice, good luck and caveat vendor. It remains our position that by complying with simple and low-cost procedures specified in anti-spam legislation, e-mail recruiters will save themselves the trouble that will, at some point, ensue.

Of course, dealing with only opt-in lists alleviates this problem altogether, which, in IMRO's published opinion, is the best course of action.

Bill MacElroy
Pres., Committee Chairperson for Ethics and Online Privacy
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Trade Talk

By Joseph Rydholm, *Quirk's* editor

Notes from Los Angeles

I didn't get to sit in on every presentation that I wanted to at the American Marketing Association's annual research conference in September but here are some of the highlights from those I was able to attend.

• James Mendelsohn, director of marketing research at Capital One, gave a very interesting presentation on Capital One's program to streamline and systematize its dealings with research vendors. Prior to its efforts, research managers were free to choose any supplier they wanted, which gave welcome freedom to the department but led the company to go from using three suppliers in 1999 to 108 in 2003. Following the introduction of the Vendor Management Program, the company has eliminated RFPs and instead assigns work directly to suppliers. In some cases, such as projects employing standard methodologies, if the Capital One research department is only a middleman between a research supplier and an in-house client, the MR department steps out of the way. And suppliers have been challenged to work together to maximize value for Capital One as a client. So far, it sounds like things have gone well: MR department morale didn't drop precipitously; research staff can now devote more time to analysis rather than vendor management; and project turnaround times are faster.

• In his talk on television network branding in a digital environment, Artie Bulgrin, senior vice president of research and sales development at ESPN, Inc. debunked some of the perceptions that arose in the early days of the Internet. For example, the experts said that people would spend less time with their TVs and more time with the Internet. Wrong, Bulgrin said: average TV viewing has increased 14 percent in the past 10 years; 50 percent of the average person's daily media time is spent with TV — only 11 percent of that time is spent online. He also outlined four ways that TV brands can develop strong relationships with their viewers: by consistently demonstrating that they care about their viewers and know what they are looking for; by being unique and different (indeed, Bulgrin said that research paved the way for ESPN's decision to launch its original entertainment division, through which it has developed sports-related movies such as *The Junction Boys* that are broadcast exclusively on ESPN) and projecting a personality that viewers can recognize; by establishing a brand environment, during and outside of program minutes, that is relevant and talks to that viewer; and by entertaining the audience.

• I found out from J. Walker Smith of Yankelovich Partners that we're not "cocooning" anymore, we're "hiving." Rather than retreating into our homes and shutting out the rest of the world, Smith said we're now interested in making our homes into safe settings that are abuzz with activity and engagement. People are still looking for comfort in their lives, even two years removed from 9/11, and they get it by "connecting" with other people. That togetherness can be forged in person, by playing board games in our rec rooms or hosting backyard parties, or by being always-available to friends and family through our cell phones and e-mail accounts. The hiving phenomenon is also fueling the popularity of shows like *Trading Spaces* and networks like HGTV, which make home renovation and decoration into fun, collaborative activities.

• MetLife's Neil Marcus and Data Development Corporation's Peggy Lebenson detailed the success of their companies' excellent client-supplier relationship. Each year MetLife uses Data Development Corporation (DDC) to conduct phone interviews with thousands of customers for its account management study (achieving a whopping 65-70 percent cooperation rate). MetLife rightly views the interviewers as extensions of its company, so prior to the annual kickoff of the study, Marcus visits DDC's offices and personally briefs the interviewers, explaining to them how the research is used and stressing the value and importance of their role in the process. Interviewers are also eligible to receive bonuses at the end of the year from MetLife if no complaints are received from MetLife customers regarding the interview process (in the seven years of the study, only one complaint has been received).

Marcus had three excellent questions for client companies who are using an interviewing firm to survey customers: Do you know who the interviewers are? Have you listened to them speak to your customers? Do you reward them for a good job and remove those who aren't up to your standards?

As Marcus pointed out, you are in effect leaving these interviewers alone with your customers, so if you've never asked yourself those questions, now might be a good time to do so.

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