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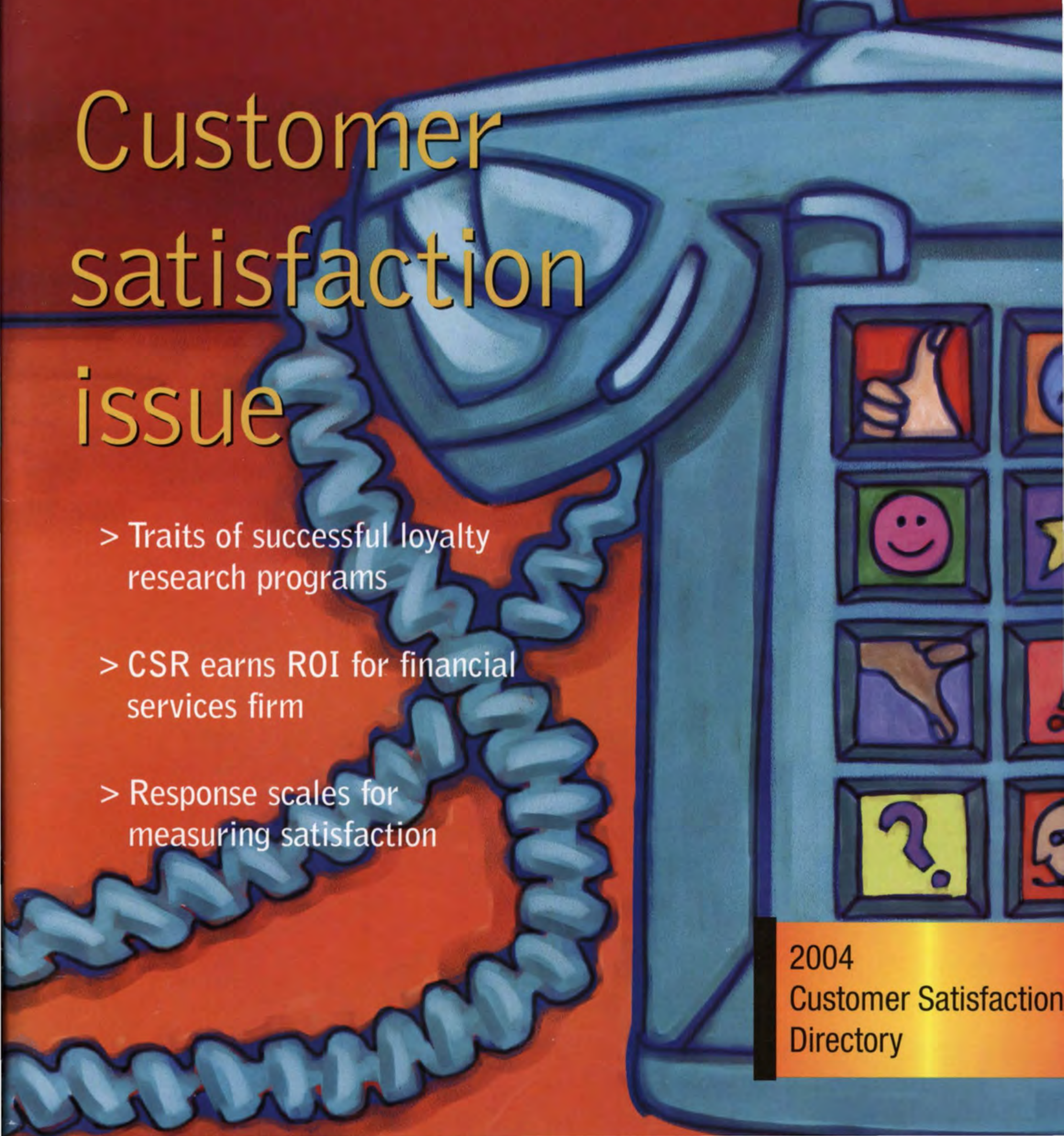
QUIRK'S
Marketing Research Review



Customer satisfaction issue

> Traits of successful loyalty research programs

> CSR earns ROI for financial services firm

> Response scales for measuring satisfaction

2004 Customer Satisfaction Directory

Quirk's Marketing Research Review
Volume XVIII Number 9

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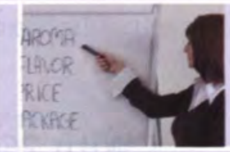

Extreme sports are popular

From Florida to Alaska and from Maine to Hawaii, extreme sports are popular with the general public. According to the Superstudy of Sports Participation, conducted by

SGMA International, North Palm Beach, Fla., extreme sports are an established trend and here to stay. Following are some additional facts on the 12 most popular extreme sports.

Inline skating: 51 percent of all inline skaters are female, yet 58 percent of all frequent (25+ days/year) inline skaters are male.

Skateboarding: The average number of days of participation for a skateboarder in 2003 was 44 days.

Paintball: U.S. sales and overall participation in paintball have risen each year since 1998.

Artificial-wall climbing: The average age of an artificial wall climbing enthusiast in 2003 was 19.9 years of age.

Snowboarding: Sales of snowboard equipment in 2003 were $141 million (at wholesale).

Mountain biking: Nearly 70 percent of mountain bikers are male.

Trail running: Since the late 1990s, overall participation has grown 17.3 percent in trail running - from 5.2 million (in 1998) to 6.1 million (in 2003).

BMX bicycling: The average age of a BMX cyclist in 2003 was 26.5 years of age.

Wakeboarding: The average annual household income of a wakeboarder in 2003 was $73,400.

Roller hockey: Of the 2.7 million roller hockey players, 33 percent of them (900,000) play the sport on a "frequent" (25+ days/year) basis.

Mountain/rock climbing: Nearly 60 percent of mountain/rock climbers are male.

Boardsailing/windsurfing: More than 40 percent of all boardsailors live in the South and more than 52 percent of boardsailors live in cities with a population of more than two million. For more information visit www.sgma.com.

Airport ads reach upscale consumers

Airport advertising is an effective medium for reaching upscale Americans, according to a study by Arbitron Inc., New York. According to the "Arbitron Airport Advertising Study: Exploring an Undiscovered Upscale Medium," the reach of airports is significant, with 92 million Americans having flown in the past year. Eighteen percent of this group - or 17 million people - are frequent flyers who are affluent and well-educated consumers who take four or more flights per year and account for nearly 60 percent of all airport advertising impressions.

One-third (33 percent) of frequent flyers have an annual household income of at least $100,000 compared to only 10 percent of the average American. More than two-thirds (68 percent) have a college or graduate degree.

"Airport advertising has traditionally targeted the business-to-business and technology sectors, but frequent airline travelers are sophisticated consumers with varied tastes and the income to pursue their interests," says Diane Williams, custom research analyst, Arbitron. "Airport advertising presents a unique opportunity for premium brands, especially luxury goods and entertainment services, to reach their upscale targets in a captive environment."

The number of consumers using air travel from season to season is remarkably consistent, with a slight peak occurring only during the winter holidays, when one-quarter of Americans fly. In this modern world of heightened security, Americans are getting to the airport earlier and spending more time in the lobby and terminal areas each time they travel. While waiting at the airport, 72 percent of travelers read the airport advertising billboards around them and 64 percent pass the time by shopping.

Forty-five percent of frequent flyers are "mega-milers," consumers who log 261 or more miles per week in an automobile and are heavily exposed to outdoor advertising. Less than a third (32 percent) of average Americans clock that many miles per week. Thirty percent of frequent flyers are heavily exposed to street furniture and transit advertising by walking five or more miles a week in a city or downtown area, compared to 21 percent of the general population. This makes the airport a natural extension of an outdoor campaign.

"Airline travelers spend less time with television and are heavy consumers of other out-of-home media including billboards and street furniture," says Jacqueline Noel, vice

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names of note

Kawasaki Motors Corp., U.S.A., Irvine, Calif., has named **Patrick Kelly** director, product planning and research.

Bill Cullo has joined McLean,Va.-based *Wilson Research Services* as executive vice president. He will be based in the firm's Washington, D.C., office.

At *C&R Research*, Chicago, **Erin Barber**, **Megan Jackson**, **Julie Lizer**, **Jane Ott** and **Monica Patanella** have all been promoted to senior research analyst.

MORPACE International, Inc. has promoted **Craig Porter** to senior vice president. He will be based in the company's corporate office in Farmington

Porter **Cosentino**

Hills, Mich. At MORPACE West, Irvine, Calif., **Tony A. Cosentino** has been named vice president of business development for the technology and telecommunications group.

Elys Roberts has been appointed managing director of *Medefield America*, a New York provider of pharmaceutical research field services.

Maritz Research, St. Louis, has promoted **Keith Chrzan** to division vice president, marketing sciences, and **Gina Wiseman** to division vice president, virtual customers. In addition, **D. Randall Brandt** has been named vice president, customer experience and loyalty research.

London-based *Fieldwork International* has named **Nicola Lewis** in-field project manager, **Gareth Nicol** deputy field manager, and **Anne Peyretout** manager of MedTran, the firm's medical translation service.

Bellomy Research, Inc., Winston-Salem, N.C., has named **Kimberly Cameron**

Cameron **Campman**

research manager. In addition, **Amy Campman** has been named account manager and will lead the company's utility research group.

Cindy Trish has joined *Knowledge Networks*, Menlo Park, Calif., as senior vice president and managing director, in the company's Needham, Mass., office.

In July, *Galloway Research Service*, San Antonio, Texas, celebrated the 20-year employment anniversary of General Manager **Linda K. Brazel**.

Invoke Solutions, a Tenafly, N.J., research firm, has appointed **Anne Busquet**, CEO of IAC Local and Media Services, and **Rory Cowan**, chairman and CEO of Lionbridge Technologies, to its board of directors.

Walker Information, Indianapolis, has announced a number of staff additions and promotions. In the client service and support departments, Walker Information has promoted **Chris Woolard** to client service director 3, **Melissa Harmon** to client service director 1, and **Jennifer Pote** to LAN support specialist 2. Also in the client service department **Leslie Pagel** has been named group director, training and development; **Krista Roseberry** has been named director, project director training and development; **Annie Doerr** and **Diane Egbert** have been named project directors; and **Katie Sheets** has been promoted to director 2. In addition, **Anna Carey** has joined Walker as a Web production specialist.

Ipsos has named **Rob Carpenter** a vice president in its products division in Chicago.

NOP World, New York, has named **Lock Collins** chief talent officer and group human resources director.

U.K.-based retail research firm *ESA* has named **Julian Zammit** business

Zammit **Buckledee**

group manager and added **Mark Buckledee** to its mystery shopping division as project executive. In addition, **Max Fornaciari** has been named senior data processing executive, and **Sajani Mittal** has been promoted to senior project executive.

Jeffrey Hays and **Jason Palmer** have been named vice president of client service at *Catalina Marketing Research Solutions*, Schaumburg, Ill.

London-based *Synovate Healthcare* has announced several management appointments. **Bob Douglas** has been named managing director - Europe and Asia. **Louisa Miles** will take on the new role of global training manager. **Stuart Bartlett** has been named regional director Synovate Healthcare Asia Pacific. **Prema Gopal** has been promoted to project director in the Synovate Healthcare Singapore office. And **Andrew Wood** is now manager - Jigsaw and U.K. ad hoc.

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Research youth market via text messaging

Stamford, Conn.-based North Castle Partners' Nextstep digital youth marketing division, in a strategic alliance with text messaging technology provider enpocket, has created Mobile Youth IQ (MYIQ), a learning tool for the text messaging marketplace. Through MYIQ, Nextstep is able to conduct market research through real-time text messaging, allowing its corporate subscribers to gain insights into the evolving youth market.

Nextstep works with a panel of pre-screened teens and young adults (ages 12-22) to conduct specific surveys via text messaging every week. Through MYIQ, Nextstep conducts general industry surveys to provide insights around wireless and text advertising and marketing trends to subscribers of the MYIQ monthly newsletter. Custom surveys are also available from which clients can obtain feedback on the youth markets' attitudes towards their specific campaign ideas. For more information visit www.ncpnextstep.com.

New Web-based CSM products for financial institutions

Omaha-based Customer Service Profiles has released Reports onDemand and STARS, two Web-based tools for assessing and improving employee performance and customer satisfaction. Reports onDemand provides clients with a real-time summary of their institutions' employee performance scores, customer satisfaction indicators and comments and perceptions from customers down to the employee level at all locations of a financial institution. Data is gathered from customer-based shopping processes and post-episodic telephone research using objective customer evaluators, verified via a quality-control process and then posted onto a secure Web site. Clients view reports tailored to their management level. Executives obtain high-level snapshots showing the trends occurring throughout their institutions, and can drill down to region, branch or employee scores. They can compare specific regions or branch scores to determine which ones are under- or over-performing. Branch managers use the site for employee performance reviews as well as coaching and training purposes.

STARS is an online performance management resource to help managers in training employees with their customer service tactics. Although the STARS Web site is separate from Reports onDemand, it is integrated so a manager can find relevant content. Both sites are included as part of Customer Service Profiles' Service Excellerator System, which integrates measurement, management and training programs into one system. For more information contact John Berigan at 800-841-7954 or visit www.csprofiles.com.

Knowledgebase launches Consumer Passion Index

KnowledgeBase Marketing, Richardson, Texas, and its partner Mal Dunn have launched a new lifestyle database called Consumer Passion Index. The new database combines purchase data from Mal Dunn with the demographic lifestyle and attitudinal data in KnowledgeBase Marketing's AmeriLINK national consumer database. There are over 60 passions to choose from, spanning sports, personal expression, travel, hobbies, intellectual interests, product preferences and causes, as well as a range of demographic and other parameters. For more information visit www.kbm1.com.

New Asian market report

Los Angeles-based research firms Interviewing Service of America (ISA) and Cultural Access Group (CAG) have partnered to create The Asian American Market Report. Using research findings from a variety of sources, including a CAG/ISA quantitative study and the CAG Asian Advisory online panel, it is designed to provide marketers with useful statistics, data, and insights on Asian-Americans. For more information call Michael Halberstam at 818-989-1044 or Raul Lopez at 305-971-1437.

Monitor new CPG segments with LabelTrends

ACNielsen U.S., Schaumburg, Ill., has launched LabelTrends, a new service that monitors sales trends in 13 of the hottest consumer packaged goods (CPG) product segments, such as low-carb, low-fat, organic, and sugar-free. Operating within ACNielsen Strategic Planner, an online sales tracking database of CPG products in nearly 1,100 syndicated categories, LabelTrends groups products with similar claims on their labels such as "reduced fat" or "no added sugar." For more information visit www.acnielsen.com.

System delivers the voice of the customer

CustomerSat, Inc., Mountain View, Calif., is now offering the CustomerSat Enterprise 7 survey and analytics system. Enterprise 7 enables businesses to hear, analyze and act on the voice of the customer through multiple channels, including speech-enabled interactive voice response (IVR) and Web, in addition to traditional phone interviews and paper questionnaires. CustomerSat's support for these channels now extends to mobile devices such as PDAs and cell phones.

Speech-enabled IVR interprets and digitizes customers' spoken ratings and rankings, and records and stores customers' verbatim comments as

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THE INDUSTRY'S BEST KEPT SECRET

research industry news

News notes

In July, Wilton, Conn.-based **Greenfield Online, Inc.** announced the pricing of its initial public offering of 5,000,000 shares of its common stock at $13 per share on the NASDAQ National Market under the ticker "SRVY." In the transaction, Greenfield Online sold 4,000,000 common shares, with net proceeds of approximately $46 million after deducting underwriting discounts and commissions and estimated offering expenses; and selling stockholders sold 1,000,000 common shares, with net proceeds of approximately $12 million after deducting underwriting discounts and commissions. The selling stockholders granted the underwriters a 30-day option to purchase an additional 750,000 shares of common stock to cover over-allotments, if any.

Las Vegas-based **MRCGroup Research Institute** has announced an acquisition-based expansion initiative. "We're interested in acquiring branded, successful researchers or firms, who, with the proper MRC financial and management support, can maximize their growth potential," says Jim Medick, CEO and founder.

Individual branding and corporate identities would remain intact under the firm's acquisition plan. "There are some brilliant minds out there working in the market research industry. Smart men and women with good ideas, energy and innovation but they don't have the capital to continue their growth. We want to give them a home with room to flourish in every way, without having to lose their identity," Medick says. For more information contact Medick at 702-360-7711 or at medick@mrcgroup.com.

BBM Canada, the Canadian industry consortium for audience ratings, has adopted the Arbitron Portable People Meter (PPM) as the official ratings system for buying and selling commercial airtime on French-language television in Quebec and Montreal.

The PPM-based television ratings service, which has been operating in parallel with the current ratings system in Canada's second largest province since September 2003, replaced push-button people meters beginning in September 2004. BBM will completely phase out push-button people meters in the Quebec market by the end of the year. Arbitron's Portable People Meter system uses a small, pager-sized audience measurement device to track broadcast, cable and satellite television viewing as well as radio listening.

Research International Group (RI) has made a three-year commitment to a World Vision project in Kenya which will enable nine young people to continue their education to

Calendar of Events October/November

Sawtooth Software will hold its conference on the acquisition and analysis of market research data on October 6-8 in San Diego at the Shelter Pointe Hotel and Marina. In addition to the general conference, there will be optional tutorials, clinics and workshops. Attendance will be limited to 200 participants. For more information call Danell Neibuhr at 360-681-2300 or visit www.sawtoothsoftware.com.

The Council of American Survey Research Organizations will hold its annual members-only conference on October 6-8 at the Hilton Head Marriott Beach and Golf Resort, Hilton Head, S.C. For more information visit www.casro.org.

The European Society for Opinion and Marketing Research (ESOMAR), in conjunction with EMAC, will hold its research in marketing conference on October 10-12 in Warsaw. For more information visit www.esomar.org.

The Media Research Club of Chicago will hold its biannual symposium, themed "Consumers in Control: The Future of Media Measurements," on October 12 at the Courtyard by Marriot Magnificent Mile, Chicago. For more information visit www.mrcc-online.com.

The Institute for International Research will hold its annual market research event on October 26-29 at the Hotel Nikko in San Francisco. *Quirk's* readers can receive a 15 percent discount on registration fees by using the code XM1628QUIRKS and registering via phone at 888-670-8200 or via e-mail at register@iirusa.com. For more information visit www.iirusa.com/research.

ESOMAR will hold its annual Latin American conference on October 24-26 in Mexico City. For more information visit www.esomar.org.

The Interactive Marketing Research Organization will hold its annual event in conjunction with the IIR annual research conference on October 26-29 at the Hotel Nikko in San Francisco. For more information visit www.imro.org.

SPSS will hold its Directions 2004 user conference on October 24-27 in at the Flamingo Hotel in Las Vegas. For more information visit www.spss.com/spssdirections.

The Qualitative Research Consultants Association will hold its annual conference on October 27-30 at the Tapatio Cliffs Resort, Phoenix. For more information visit www.qrca.org.

The Marketing Research Association will hold its annual fall education conference and technology forum on November 3-5 in San Diego. For more information visit www.mra-net.org.

The Advertising Research Foundation will hold its annual Week of Workshops on November 3-5 at the New York Marriott Financial Center. For more information visit www.thearf.org.

ESOMAR will hold a conference on telecommunications on November 7-9 in Brussels. For more information visit www.esomar.org.

ESOMAR will hold a conference on qualitative research on November 28-30 in Cannes, France. For more information visit www.esomar.org the university level. Now in the second year of support, RI has so far donated over $30,000. The firm makes a company donation of approximately $10,000 at the start of each year and matches that donation in money raised by Research International people throughout the world by the middle of each year.

DSS Research, Ft. Worth, Texas, has received certification from the Privacy Certification Program for Business Associates (PCBA) after an on-site review in June found that DSS had demonstrated compliance with national standards to safeguard personal health-related information. DSS was required to meet standards addressing privacy protections for oral, written and electronic health information, and processes and practices respecting the use, disclosure and secure storage of personal health information.

PCBA standards also require employee training in protecting personal health information, consumer access to their own health information, and contracting between covered entities and their business associates. PCBA was established in 2003 by the Joint Commission on Accreditation of Healthcare Organizations and the National Committee for Quality Assurance. It is designed to assess whether organizations referred to as business associates under the federal Health Insurance Portability and Accountability Act of 1996 are meeting essential requirements for safeguarding identifiable health information.

New York-based **Arbitron** and **Nielsen Media Research** have devised and tested new approaches that yield sample performance indicators (SPI) that are in line with what Nielsen would expect when recruiting and maintaining a set-top meter panel. These measures are substantially higher than those achieved by Arbitron in the first U.S. Market Trial of the PPM in Philadelphia in 2002.

"Our joint effort with Nielsen Media Research has created two similar sets of methods that produced acceptable sample performance indicators in two parallel PPM tests," says David Lapovsky, executive vice president, Arbitron Inc.

The new methods were different from the 2002 methodology in that they: utilized membership representatives for at least some of the recruitment and ongoing maintenance of the panel; increased the financial incentives given to panelists; and included other methodological improvements. "The new methods increased the 8-to-10 percent response rate seen in the 2002 market trial, to the 33-to-34 percent sample performance indicators seen in recent test results in Philadelphia," says Lapovsky. "In our Houston demonstration market, Arbitron is using one of the methods just developed and tested but using the Arbitron name,

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 By Nick Calo

Is the quantitative follow-up an endangered species?

"We recommend further quantitative research to test the hypotheses that are generated by these findings." Recognize that sentence? If you're a qualitative researcher, that sentence, or some variation of it, is probably stored on your word processor and you automatically drop it into every report that you issue. If you're a buyer of qualitative research, you've probably read it more times than you care to remember.

The sampling limitations of qualitative research and the use of interviewing methods that defy replication have caused most qualitative researchers to include some form of the "don't use this without further testing" disclaimer in their reports. This cautionary statement suggests an expectation that clients will follow-up qualitative research with Phase 2: a larger-sample, more rigorously conducted, quantitative study. In an ideal world, with companies having expansive budgets for marketing research and the time to conduct multi-phased projects, that expectation might be justified. But economic and corporate climate changes are threatening Phase 2, requiring researchers to take action before the quantitative follow-up becomes extinct.

Threats to the quantitative follow-up

• *Compressed timelines.*

Product development timelines are being increasingly compressed. With a goal of being the first to market with a new product or an enhancement to an existing product, marketers are forced to react very quickly to product development information gathered through qualitative research. Particularly in the technology sector, where windows for success are open very briefly, the time to follow up qualitative research with a quantitative study often does not exist. Product developers must rush to market with the findings from qualitative research, no matter how untested those findings might be, or competitors will beat them to the market. Many technology marketers operate with an attitude of, "Let's get this product on the street tomorrow. We'll fine-tune it in Release 2.0." Immediately using the results of a qualitative study is consistent with that thinking; waiting for the quantitative follow-up is not.

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• *Demands on the research budget.*

Marketing research directors are under pressure to reduce spending or, at the very least, to do more without increasing spending. Forced with a decision to spend limited research dollars on a multi-phase project for one internal client or on several single-phase projects for multiple clients, the prudent strategy for the research director hoping to satisfy as many internal clients as possible is likely to be the latter approach. Thus, the quantitative follow-up is threatened in favor of research for another internal client.

• *Contracting populations.*

Some markets are contracting so rapidly that there are simply no

respondents to include in a quantitative follow-up. Fifteen years ago, a marketer of branch automation technology for the banking industry might have targeted the top 200 banks in the U.S. to assess market acceptance of a new product idea. That strategy would allow it to follow up a small-sample, qualitative project with a larger-sample, quantitative study of the target audience. With the contraction of the banking industry, today that same marketer might feel that success or failure of the new product introduction will be determined by the top 50 banks, or even fewer. So, after conducting a series of focus groups or depth interviews with the key targets in the banking industry, with whom would that quantitative research be conducted? In banking and other categories of business-to-business marketing, there is simply no one available to participate in a quantitative follow-up after the qualitative research has been conducted.

• *Decision makers are questioning the value of greater precision.*

A well-conducted quantitative follow-up will add precision to qualitative research findings. A series of focus groups can draw only a conclusion such as, "Most of the customers liked the new concept." "Most" can mean anywhere from 51 percent to 99 percent. A quantitative follow-up will add precision, allowing the researcher to define "most" with a single number and some error range around that number.

Increasingly, we have heard clients question the value of this greater precision. After the qualitative phase, marketing decision-makers are saying, "I know enough now to make my decision. I can't see how a more precise answer would affect it."

And, in many cases, it is difficult to argue with that logic. For example, if a client conducts qualitative research as a disaster check and Phase 1 confirms the client's worst fears, it would be difficult to justify a quantitative follow-up to determine the size of the looming disaster. As an example, a consumer products marketer tested a television ad through qualitative methods because a senior executive of the company feared that the ad would be threatening to women. His hunch was accurate. Small groups of women, independently recording their thoughts as the ad ran, were appalled by the ad and were shocked that the company would have considered running it. Someone present at the results presentation said, "But that work was qualitative. Shouldn't we test it with a bigger sample?" The senior executive responded, "Not with my money we won't." He had learned enough from the qualitative research to make his decision. The reaction he had feared was dramatically witnessed. He had no interest in spending more money to determine the percentage of women who would be appalled by the ad.

Strategies to save Phase 2

• *Demonstrate the contribution that each phase makes to the learning process.*

The client that pays for a second phase of research and learns what she already knew from Phase 1 is certain to feel cheated. It is incumbent upon the research supplier and the internal marketing research team to demonstrate that different learning emerges from each phase of the project.

An example may help to illustrate this point. A two-phased project was conducted for a technology marketer exploring a new product introduction. Six Phase 1 focus groups were followed by 500 Phase 2 telephone interviews. In presenting the project's results, it was emphasized that the Phase 1 findings indicated why people held certain attitudes, but that the groups were unable to determine how many people held a given attitude or how attitudes varied by market segment. The Phase 2 findings answered those questions, but did little to build an understanding of the rationale for the respondents' views. The client realized that both phases of the project were necessary, because only when combining the results of both phases did she obtain a complete picture of the new product's opportunity for success and the marketing challenges she would face.

• *Be willing to scale-down the scope of Phase 1.*

Most marketing researchers like to conduct large projects. After all, it's a business not a hobby. But those 12-group Phase 1 projects invite clients to say, "Do I still need to do more research after all those groups?" The answer may well be yes, because no matter how many Phase 1 groups are done, they are unlikely to provide answers to the client's critical quantitative questions. So, the researcher intent on delivering a more complete answer to the client's marketing needs may have to encourage the client to scale back on Phase 1 in hopes of keeping Phase 2 alive. That's a tough call for those of us on the supplier side - it's akin to a waiter recommending that you cut back on appetizers to leave room for the main course. But, it should be done on those occasions when it is apparent that an expansive Phase 1 may threaten the execution of Phase 2.

• *Convey the value of "numbers" in building a case to senior management.*

In this era of the electronic transmission of data, a VP of marketing at a company that we serve asks us to bind our reports. The more tables, the bigger the binder, the better. Reason: when he meets with his management to get funding to move forward with new product development, he drops the binder on the table in front of senior management. He refers to the resulting noise as the "plop value" of quantitative research, claiming that it conveys a "we did our homework" message that he can't get from qualitative research.

In a less colorful manner, another client says, "Our senior management will never believe the results of qualitative research. If we tell them that the Phase 1 results were supported by a Phase 2 quantitative follow-up, they are ready to listen."

Whether the action is dramatically crashing a binder on the conference room table or relying on the persuasiveness of a representative sample, the message is the same: the quantitative follow-up provides a level of credibility to senior management that qualitative research often lacks. For the client who must make a case to senior management to move his or her ideas forward in the organization, that factor alone may be the key to saving Phase 2.

There may be times that nothing can be done to preserve the quantitative follow-up. Organizational issues or constricting markets might demand that a study begins and ends with qualitative research. But, for those cases in which a quantitative follow-up is possible, the strategies noted in this article - demonstrating the unique learning from each phase, scaling back the scope of Phase 1, and emphasizing the persuasive value of numbers - may be effective in keeping Phase 2 alive. | Q

By Karen Ahlgrim

Common traits of successful loyalty research programs

Editor's note: Karen Ahlgrim is executive vice president at M/A/R/C Research, Irving, Texas. She can be reached at karen.ahlgrim@marcresearch.com or at 800-884-6272, ext. 3712.

After receiving a customer loyalty report that found more than 50 percent of customers were alienated or at-risk, the client - faced with an upcoming presentation to senior management - gave his marketing research agency the following instruction: "Make sure you emphasize that the satisfaction findings only reflect customer perception, not reality."

Reading the request, it became obvious why this firm's customer loyalty was so low - the problems stemmed from deep within the infrastructure, mindset and culture of the organization.

Our firm has helped numerous clients design and implement customer satisfaction and loyalty programs in diverse industries. We've seen the good, the bad and the not-so-pretty. Many programs work beautifully when organizations are committed and rise to the challenge. But unfortunately, some programs falter when organizations fall victim to situations like the above. Across the board, successful programs share the following common traits, while programs doomed to fail share bright-red warning flags.

Successful traits

• *Sponsorship from the top.*

These organizations have a leader who walks the walk and ensures that critical strategies and initiatives meet the customer test.

• *A burning hunger for information, from varied sources.*

These organizations are not just content with internal measures. They seek feedback from customers and non-customers alike. They want to know how well they're satisfying their customers and how this compares to their competitors' performance.

• *New information, good or bad, is a goldmine.*

These organizations view every kernel of feedback as an opportunity to learn. They understand that sometimes they might discover findings they don't like. But they realize the incredible opportunity for growth and innovation that accompanies this kind of learning.

• *"We better do something, now!"*

There's no stalling with these organizations. They are quick to mobilize and take action based on customer feedback, even when that action involves wounding sacred cows or reinventing processes that have been etched in stone for years. They know that neither time nor the competition waits. Victory comes only to those who take action.

• *Customer satisfaction and loyalty is a part of everyone's job!*

Research sponsors readily share the results across their organizations. Executives mandate that the findings be woven into programs, protocols and processes. These organizations integrate customer satisfaction and loyalty into the duties and goals of every employee.

They make customer satisfaction part of the everyday, not something done on the side when there's time. And, in doing so, they place the customer at the center of their organizations - a proven prescription for success!

• *Long-term customer loyalty is sustained by motivated employees.*

These organizations understand that most employees want to achieve results for their customers. However, employees must be given the necessary resources and authority to get this job done, and the recognition and appreciation for getting this job done well.

Warning flags

Just as there are traits of successful programs, there are also warning flags of programs that are destined for failure.

• *"Our internal data says we're doing fine."*

These organizations choose to rely on narrow streams of information. Maybe they put all their stock in internal measures, or study only the feedback from existing customers. Either way, their view of the world is myopic, leaving them vulnerable to looming competitive challenges. If an organization only measures satisfaction with its current customers, then seeing a satisfied customer base can be a self-fulfilling prophecy. What about the folks who didn't choose the client's firm, or went with the competition? Much must be learned from them.

• *"The research (or the customer) is wrong."*

Denial is the name of the game with these organizations. When they hear something they don't like, they are quick to place blame elsewhere - on the research, the customer, the economy or whatever seems convenient. By ignoring the warning signs, they're leaving themselves exposed to ever-increasing competitive threats.

• *"Let's wait and see what happens."*

Complacency, or a cultural aversion to change, poisons these organizations. They may sense there's a problem or they may be in denial. Either way, they opt to ride out the storm rather than take proactive measures. These organizations convince themselves that next time the data will say something different, even if they take no steps to make it so. They hang their tomorrows on what worked in the past, or miraculously hope things will change by themselves.

• *"Our job is to just measure and report customer satisfaction."*

Many of these organizations have sophisticated systems in place to capture the customer's voice, but no one takes specific actions in response to the findings. We often hear the lament that "It's not my job." If you hold the key, whose job is it to unlock the door?

• *Customer satisfaction and loyalty are the responsibility of a committee.*

The word "committee" is enough to send chills down the spine of the average employee. Committees imply extra work, something on the side that eats into the regular workload - a distraction. By establishing a committee (sometimes positioned as a "team") to analyze the results and create a proposal of items to change, these organizations imply that customer satisfaction is something separate from the work people do every day. This implies it's the responsibility of some, but not all. And, in doing so, these organizations are destined to fall short.

Push for change

If you see any of these warning signs around you, it's your job to challenge the status quo and push for change, fostering traits for success. Successful organizations realize the world is constantly changing, and they know that what worked yesterday won't necessarily work today. They are bold enough to look closely in the mirror of customer loyalty research and are agile enough to act upon what they see. IQ


McMillion
Research

By Rajan Sambandam

Asymmetry analysis

Asymmetrical relationships among variables in satisfaction research have been increasingly investigated in the last decade. However most of the work has been published in academic journals (such as *Marketing Science* and *Journal of Marketing Research*), which may not always be accessible to practical market researchers. The objective of this article is to both provide a simple introduction to this topic and add to the existing body of knowledge.

Before examining the question of asymmetry, we need to think about symmetry. Consider a regression analysis where overall satisfaction with a hotel was used as the dependent variable and the cleanliness of the room emerges as a key driver with a weight of 0.44. The implication here is that a unit improvement on the independent variable will result in a 0.44 unit improvement in overall satisfaction. Conversely, a unit decrease in the independent variable will result in a 0.44 unit decrease in overall satisfaction; this is a symmetrical relationship. If the independent variable is measured on, say, a 10-point scale, this result is true regardless of which scale point is considered. In other words, moving from nine to 10 will have the same impact as moving from one to two.

Is this a reflection of the method used or the underlying reality? First consider the method. Regression analysis as used in this example (and often in key driver analysis) is a linear method. The above symmetrical description is the only way of interpreting the results. Hence even if the underlying reality is different, the method will not allow us to see things differently. Is the underlying reality different?

One could consider this question both theoretically and empirically. The theoretical argument that the reality is different goes back several hundred years to Daniel Bernoulli. He put forward the idea that utility is inversely proportional to the quantity of goods possessed. That is, "If the satisfaction derived from each successive increase in wealth is smaller than the satisfaction derived from the previous increase in wealth, then the disutility caused by a loss will always exceed the positive utility provided by a gain of equal size" (see Bernstein 1996). This idea was further refined by Kahneman (2002 Nobel Prize winner in economics) and Tversky when they developed prospect theory to show that people weight losses more than gains of equal magnitude when changes are measured from a reference point.

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Essentially, we are talking here about an asymmetric effect where the impact on the negative side happens to be larger than the impact on the positive side. Does this apply to satisfaction research and can it be demonstrated? (See Anderson and Mittal, 2000, for a review.)

The simplest way to demonstrate asymmetry is to plot the relationship between an attribute and overall satisfaction (Figure 1). For simplicity, the attribute satisfaction scale has been divided into three parts (say, Dissatisfied, Moderately Satisfied and

Very Satisfied). The kink or elbow in the chart shows the existence of an asymmetric relationship. The interpretation here is that moving respondents from the bottom boxes (Dissatisfied) to the middle boxes (Moderately Satisfied) has a stronger positive impact on overall satisfaction, than does moving them from the middle to the top boxes (Very Satisfied). Similarly, moving respondents from the middle to the bottom boxes has a stronger negative impact than does moving them from the top to the middle boxes.

Such an interpretation provides multiple courses of action for the manager. If the bottom boxes are more populated than they should be, then the strategy would be to try and move some people into the middle boxes. If the bottom boxes are sparsely populated but the middle boxes are heavy, then preventing the middle box people from migrating down would help immensely in maintaining the current overall satisfaction. Attributes of this type are often called "satisfaction maintaining", but clearly the actual dis-

Figure 1

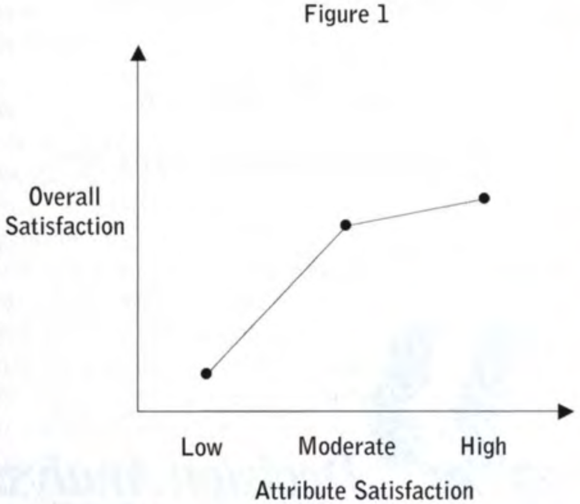
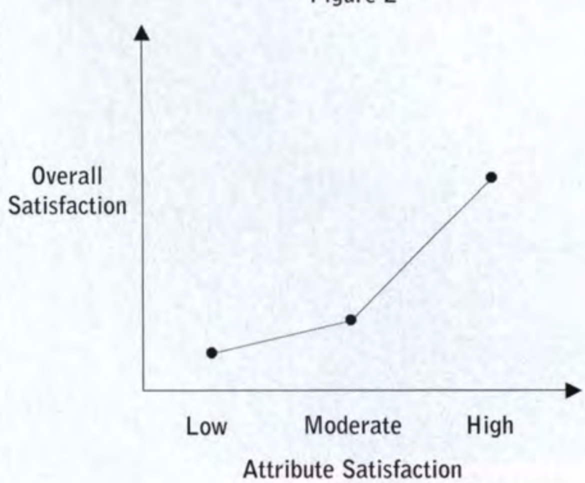


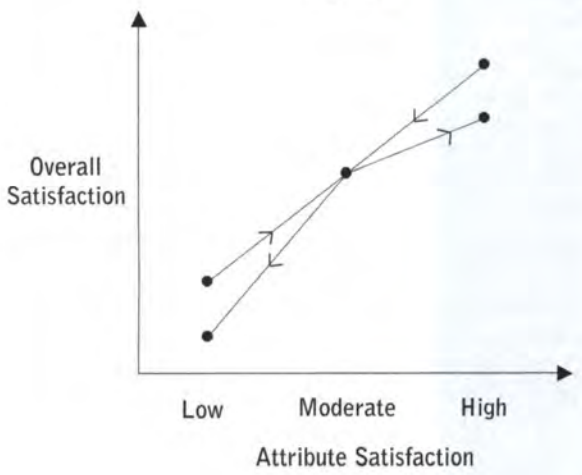
Figure 2



tribution will have to determine the recommended action.

Given the minimal gain in moving from the middle to the top boxes, it should be pursued only if it is inexpensive to do so. On the other hand, if maintaining a large number of customers in the top boxes is very expensive, some could be allowed to slide to the middle boxes without too much of a loss in overall satisfaction ratings. Comparisons with competitors can be very useful in understanding what types of improvements are possible.

Figure 3



The asymmetric relationship can also manifest as shown in Figure 2. In this case, moving respondents from the middle boxes to the top boxes has a much stronger impact than moving from the bottom to the middle boxes.

As we go through these options it is clear that the number of possible action recommendations increases quite a bit when the data are analyzed this way, as opposed to doing a regular regression analysis. If this were a completely linear relationship then both slopes would be equal (the line would be straight) and the recommendations would not be quite as nuanced.

Asymmetry in practice

Is it necessary to use only graphical or tabular methods to identify asymmetric relationships? Not at all - graphs and tables are just a simple way to do this. There are a few different ways of showing asymmetry using variations of regression analysis. Dummy variable regression is one such method. In this method, two coefficients are obtained for each variable, one pertaining to the upper part of the scale and the other to the lower part of the scale. Hence asymmetry analysis can be run with multiple independent variables.

The main problem with this approach is multicollinearity. While multicollinearity is a problem in regular regression, it is an even bigger problem in this type of analysis. One reason is that the automatic doubling of the number of variables (compared to a regular regression) increases the chances for collinearity. The second reason is that the two dummy variables that are formed from each variable are, by definition, highly correlated.

Multicollinearity's deleterious impact can be seen by comparing the results of the multiple regression analysis to a series of simple regressions. If for example, the lower part of the scale has a stronger impact than the upper part in the simple regression and the opposite result is observed in the multiple regression, then we know that multicollinearity is having a strong impact. This is similar to checking the directionality of coefficients from a regular regression analysis against the correlation matrix, to see if multicollinearity is causing signs to reverse. Of course, multicollinearity could still have an impact without actually changing the signs of coefficients. This problem is even more pronounced when we run asymmetry analysis.

Hence the solution here may be to not use multiple regression to identify asymmetric effects. Multiple regression could be used to identify which set of variables truly drives the dependent variable. Then a series of simple dummy variable regressions could be used to identify the asymmetric impact of each key driver (if they exist). In this case, the asymmetry analysis serves as a "drill down" mechanism. Traditional key driver analysis identifies what is important and asymmetry analysis clarifies why it is important and how it should be acted upon.

Table 1

High – Moderate Satisfaction

M_{H1}	M_{M2}	$\|M_{H1}-M_{M2}\|$	M_{M1}	M_{H2}	$\|M_{M1}-M_{H2}\|$
9.48	8.31	1.17↓	8.45	9.24	0.79↑

Moderate – Low Satisfaction

M_{M1}	M_{L2}	$\|M_{M1}-M_{L2}\|$	M_{L1}	M_{M2}	$\|M_{L1}-M_{M2}\|$
8.45	6.44	2.01↓	6.99	8.31	1.32↑

Such an approach in the toothpaste market, for example, identified "whitening teeth" as a particularly interesting attribute. Its positive impact was more than twice that of its negative impact. Beyond that, the performance of the brand on this attribute clearly showed that there was room for improvement. Both the bottom and middle boxes were more populated than for other attributes and consequently the top boxes were more sparsely populated. Even when compared to other brands, the top boxes were less populated. Thus there was a clear opportunity for this brand to move people from the middle to the top boxes on this attribute and thus have a strong impact on purchase interest.

Up and down

While Figures 1 and 2 are representations of asymmetry in satisfaction, it can also be looked at as two symmetries joined together. Movement within the upper and lower part of the curve is symmetrical. Hence moving from say, the bottom to the middle and the middle to the bottom has exactly the same effect in terms of magnitude. It is only the sign that is different. Is it possible that there could be asymmetries within the upper and lower parts of the curve, as depicted in Figure 3? In other words, is it possible that moving from the top to the middle boxes has a different impact on overall satisfaction than moving from the middle to the top boxes?

The best way to show this may be with longitudinal data of a new product purchase where the attribute satisfaction ratings are likely to be in a transitory state due the newness of the product. Not having access to that kind of data, I used a cross-sectional proxy by utilizing data from two annual waves of a satisfaction tracking study. All items are measured on 10-point scales. The dependent variable was overall satisfaction while the independent variable was satisfaction with price (divided into Low, Moderate and High groups). Mean values of overall satisfaction were calculated for each of the three levels of price satisfaction in the two time periods.

In Table 1, M stands for mean overall satisfaction score while the subscripts H, M and L stand respectively for High, Medium and Low price satisfaction, with 1 and 2 indicating time period one and time period two. So for example, the mean overall satisfaction score for those who had high price satisfaction scores in time period one is 9.48 (M_{H1}), while the corresponding score for those who had moderate price satisfaction scores in time period two is 8.31 (M_{M2}). The absolute difference between the two scores is 1.17 ($|M_{H1} - M_{M2}|$). The $\downarrow$ indicates that this difference is obtained when we go from high price satisfaction in one period to moderate satisfaction in the next.

In the second part of the table we see that going from moderate to high price satisfaction (represented by $\uparrow$) shows a difference of only 0.79. The same pattern of differences shows up when we look at the table corresponding to movement between moderate and low satisfaction boxes.

It appears that in both cases going from the higher level to the lower level (i.e., high to moderate or moderate to low) has a stronger impact on overall satisfaction than moving from the lower level to the higher level (low to moderate or moderate to high). What does this mean in practice? If over the course of time, the number of people slipping from top box rating to middle box rating is equal to the number moving from the middle to the top, the mean score on the variable may not change, but its impact on overall satisfaction could be adversely affected. As mentioned before, a better way of showing this would be with longitudinal data but the data used here certainly illustrate the complexities in the relationship that may not be apparent with a linear analysis.

Quite insightful

Asymmetry analysis can be quite insightful, especially in the area of customer satisfaction research. Its biggest advantage is that it can provide more precise recommendations for resource allocation than traditional key driver analysis. Generally speaking, key driver analysis results are provided using some variation of a quadrant chart - a comparison of importance and attribute performance that often focuses attention on the intersection of high importance and low performance. Asymmetry analysis takes this further by distinguishing between performance maintenance and performance improvement in key areas. This can be especially useful for the manager when finite resources need to be judiciously allocated. | Q

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By Brett Tucker

Two voices, one goal

Expedia incorporates customer satisfaction feedback and employee input to enhance service and support

Expedia has certainly come a long way since its original inception as a Microsoft CD travel guide in 1995. After selling its first travel tickets in October 1996, going public in November 1999 and being acquired by InterActiveCorp (IAC) in August 2003, Expedia, Inc. is now the world's largest online travel provider and the fourth-largest travel agency in the U.S. It has eight internal and outsourced contact centers supporting Expedia North America.

In February 2002, Expedia decided to implement a real-time customer satisfaction measurement program within its service and support organization. There were three main business objectives:

- increase satisfaction with customer support;
- measure results of training and operational initiatives;
- provide contact center management with a tool for one-on-one agent coaching.

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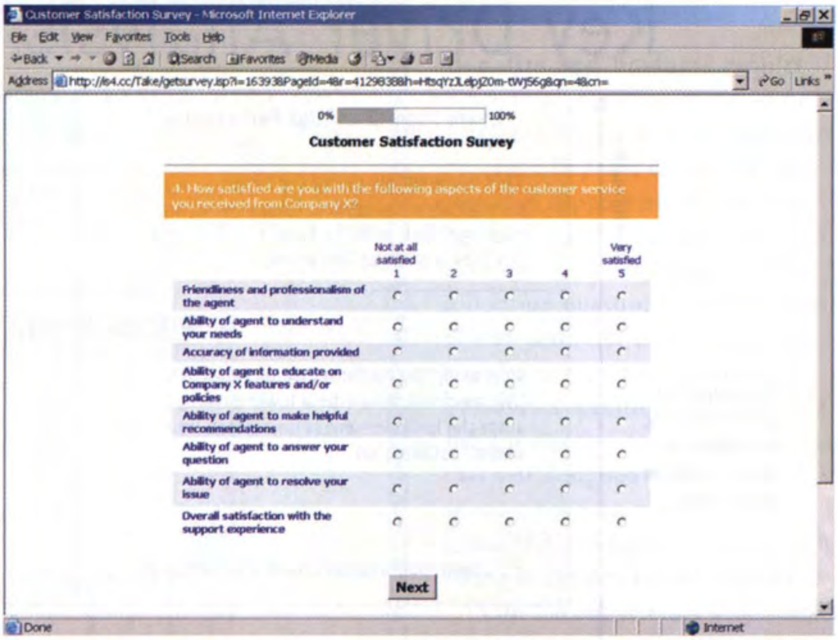
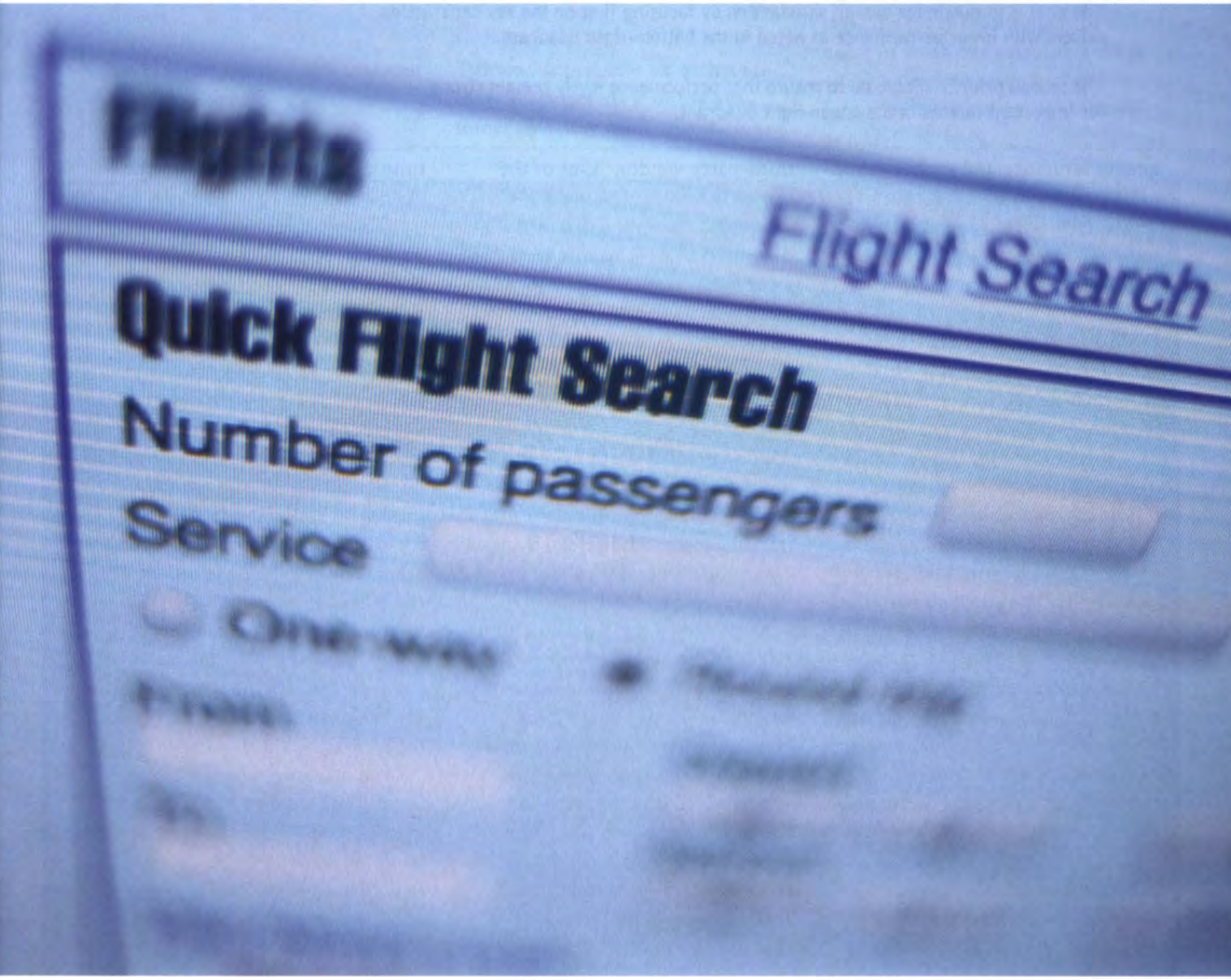
"We were looking to migrate the hosting of our existing customer satisfaction survey, which used to live on the Expedia.com Web site, to a third-party vendor," says Lynne Taddeo, Expedia's manager of customer experience. "We used to conduct weekly survey data reporting in Excel, which worked fairly well, but as we grew, we realized that this was a very time-intensive process for our internal data analysis team. In addition, our contact center managers were not receiving feedback in real time, which limited their ability to coach our customer service team on the results."

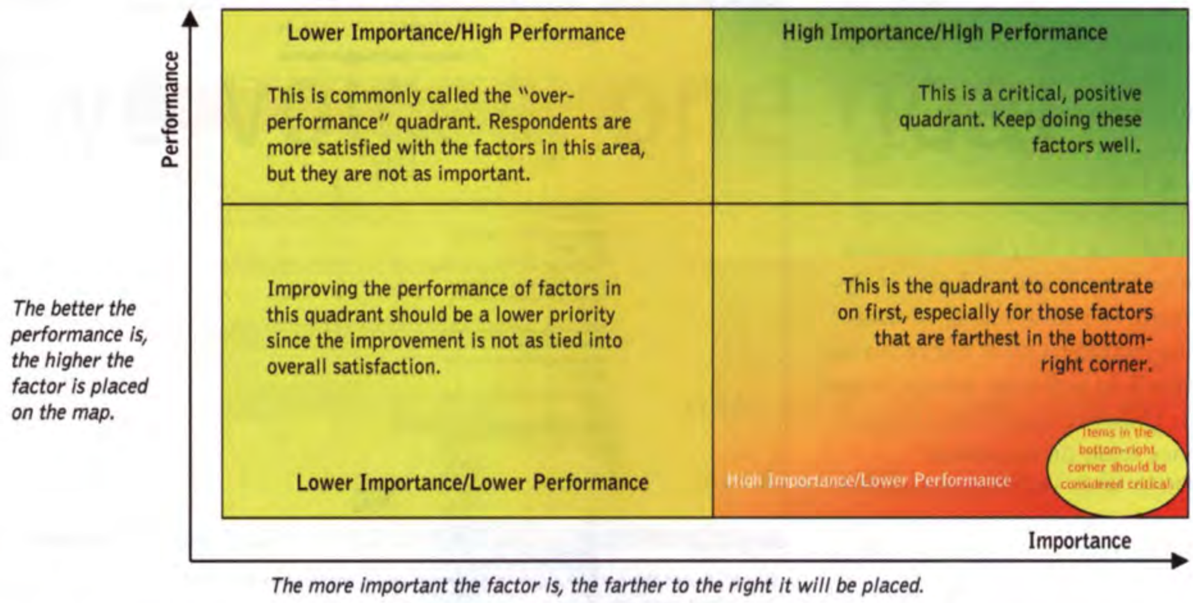
There were also other areas that Expedia wanted to improve upon, including survey design and quality measurement approaches such as



Expedia uses the satisfaction survey results to identify training, operational and performance issues that need attention.



Key Driver Analysis - Concept



The goal is to maximize overall satisfaction by focusing first on the key satisfaction drivers with lower performance as noted in the bottom-right quadrant.

The second priority should be to ensure that performance levels remain strong for important factors in the upper-right quadrant.

quality assurance and mystery shopping. But the most important goal was to be able to tie survey responses to CRM support case IDs.

Defining measurement needs

Expedia's next step was to design a customer satisfaction measurement program that would meet the business objectives it had set for its support organization. The company started by mining its existing consumer research for customer service insights, and identified skill sets or service attributes that supported its strategy. It met with contact center stakeholders to identify reporting and coaching needs. It also worked closely with the marketing department to adopt a consistent satisfaction scale, loyalty measures and other design elements enterprise-wide.

Selecting a solution

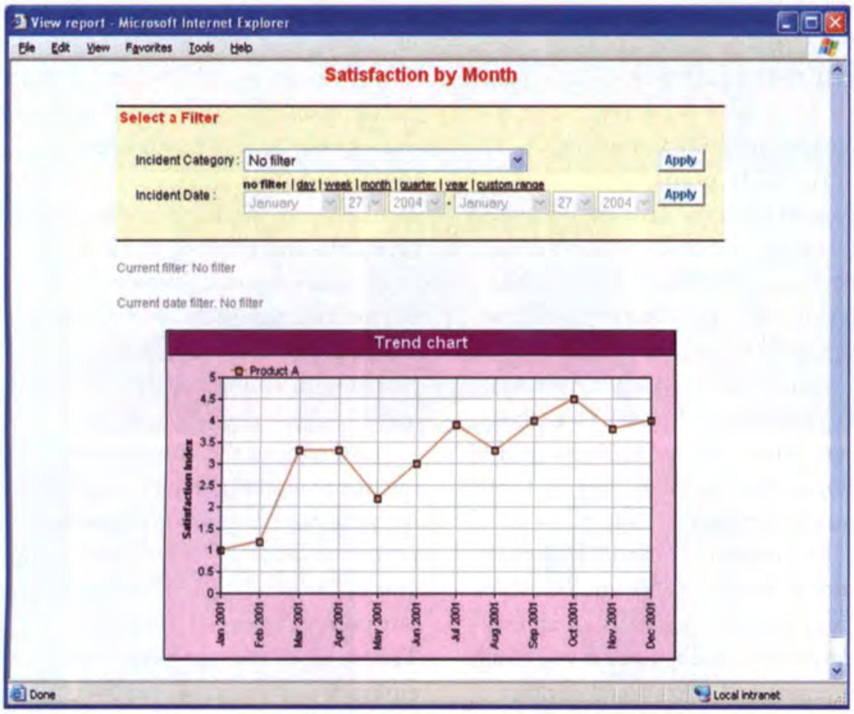
Expedia needed a reliable data collection method from an unbiased third-party vendor. "Out of the many data collection methods available in the marketplace, the option that made the most sense for us was to integrate online survey technology with our E.piphany CRM system to be able to examine data by agent, team, contact center and other case-specific information in real time, at a much lower cost," Taddeo says. "We also needed a multi-layered, permissions-based report portal to share survey findings internally with selected audiences and externally with our outsourced contact center partners."

After evaluating various vendors, Expedia decided to partner with NetReflector and immediately tasked the Seattle-based research firm with developing a custom survey distribution tool that could append CRM information from an E.piphany sample to the respondent's completed survey data. It also asked NetReflector to build an enterprise-level reporting portal that would provide relevant real-time data for everyone from the executive team to a frontline contact center supervisor.

Developing insightful reports

Expedia launched its customer satisfaction measurement program across its eight global contact centers in April 2003 after training all contact center management and internal users. Expedia is currently implementing version two of the survey, including a number of reporting and distribution enhancements requested by its contact center user base. The survey data is used as the basis for monthly quality reports that stack-rank all of its network contact centers. A key driver analysis is also generated quarterly to reveal the elements that customers really value in Expedia's service and support team. (See diagram for more on key driver analysis.)

"The custom reporting that we designed and implemented has become the most-used and most-



Armed with historical data, Expedia can track trends and adjust its customer service strategy accordingly.

valued service quality measurement tool across Expedia's global network of contact centers," says Taddeo. "It provides us with a far more powerful view of the customer than any other quality measures previously used."

Benefits and business results

Since implementing its real-time customer satisfaction measurement program, Expedia can design surveys that support more complex question types. Data collection has also improved: skip logic enables follow-up questions based on particular customer experiences; piping allows survey customization based on a specific purchase channel. Finally, the online report portal that was designed with Expedia's specific needs in mind provides enhanced real-time reporting with multiple custom report formats.

"Our executive team and contact center managers now have secure, 24/7 global online access to our customer satisfaction data," Taddeo says. "Keeping their finger on the pulse of what our customers think enables them to make better-informed business decisions more quickly."

Within nine months of implementing its online customer satisfaction measurement program, Expedia started reaping the following business results:

• Overall customer satisfaction improved by 16 percent.

• Survey response rates ranged from 11 percent to 13 percent.

• Survey design allowing for better granularity led to increased data relevance and validity.

• Automating the survey and reporting process reduced the amount of internal resources usually necessary to manage such an ongoing measurement program.

• Expedia has coaching and feedback tools which help contact center managers identify systemic training, operational and individual performance issues.

• The survey response is now linked to contact center, agent name and support case ID, and allows contact center managers to review the case vs. the customer's perception of it.

• Agents receive feedback contextualized by their own case notes.

Actionable information, actionable plans

Armed with the knowledge gained through real-time customer feedback, Expedia can now fine-tune service delivery. Analyzing data at the enterprise level and incorporating tools such as a key driver analysis, Expedia is also able to make carefully informed business decisions about its long-term customer service strategy.

In addition to using the survey tool to measure customer satisfaction, Expedia conducts an annual employee satisfaction survey of all internal and outsourced contact center personnel. Results of the annual survey and careful analysis of agent feedback help Expedia determine where to focus its contact center tool and process-improvement programs. To motivate its support staff and reinforce the fact that their voices are being heard, Expedia team members visit each of the company's eight contact centers during frequent communication tours. Customer service training is regularly conducted to improve service skills and respond to changes in the marketplace. Customer satisfaction and retention are tracked on an ongoing basis and results are shared with contact center personnel.

"Listening to the voices of both our support staff and customers and integrating them into our business processes in real time has become one of the fundamental pillars of our customer service strategy," Taddeo says. "We can now fully embrace our customer support touch-point as a valuable opportunity to reinforce relationships with our current clients, establish them as long-term sources of recurring revenue and positively impact the company bottom line." | Q

By Lois Koch and John Chisholm

Profitable insights

Building client loyalty yields strong ROI for financial services provider

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Justifying the cost of a comprehensive, ongoing customer satisfaction measurement program can be a challenge even in strong economic times. Today, in an era of cost-cutting and uncertainty, it becomes even more important to provide a cost-based rationale for collecting customer feedback. Can the customer service organization make a credible case for the payback of its feedback program?

This case study describes how banking and financial services firm Digital Insight (DI) implemented an online customer feedback program to obtain measurable improvements in service quality and outlines how the company demonstrated a positive return on its investment in the measurement program. The program, developed in 2001, continues today.

Headquartered in Calabasas, Calif., Digital Insight was founded in 1995 and grew rapidly to become a leading provider of Internet-based banking services for commercial banks and credit unions. The company's range of secure, hosted services includes retail and commercial Internet banking, electronic bill payment and presentment and online lending services.

Ambitious directive

In the summer of 2000, Lois Koch, the then-new vice president of customer service and client relations, was given an ambitious directive from the company's CEO: raise the quality of Digital Insight's customer service and client relations to a world-class level.

By mid-2000, it had become clear that Digital Insight's rapid growth had strained the existing customer service and client relations infrastructure and was impacting the company's reputation. At that time, fewer than 30 percent of Digital Insight's financial institution clients were willing to serve as references to potential new clients, causing sales to be lost to competitors.

Koch was challenged to implement a scalable customer service infrastructure and the processes to support the company's continued growth and expansion. Koch and her staff determined that improving Digital Insight's service quality was their top priority. They understood that continuous customer satisfaction research was essential to identify and address key concerns as the support infrastructure evolved. The team envisioned the use of client satisfaction and loyalty measures to serve three purposes:

• assist with prioritization of customer service investments;

• provide a continuous stream of feedback for ongoing improvement;

• facilitate coaching, rewarding, and recognition of customer-facing staff.

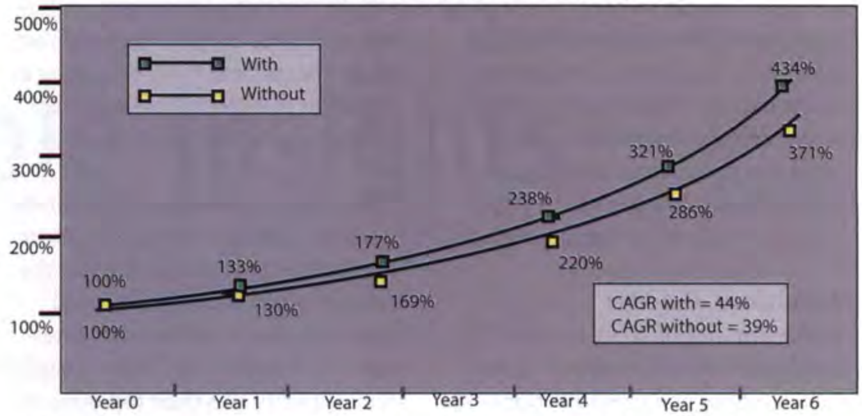
The team evaluated several strategies and technologies to measure and report on client satisfaction and loyalty. Because DI was itself an online service provider, the team recognized the importance of using online technology as a means for obtaining timely, accurate feedback that could be readily disseminated throughout the organization. DI chose to partner with CustomerSat, Inc., a Mountain View, Calif., research firm.

Measuring customer satisfaction and loyalty

CustomerSat worked with members

of the client-facing team at Digital Insight and with a core group of DI clients to identify key satisfaction and loyalty measures and to define the feedback processes. The team deployed its first online customer relationship survey in October 2000 and added transaction-based surveys in 2001. Together, the surveys provided both an initial baseline and ongoing performance measures for Digital Insight's sales, implementation, customer service, account management, product development, data processing operations and training.

Figure 1
Estimated Digital Insight Revenue Growth (normalized) With and Without Customer Feedback Programs



The online, hosted feedback solution that CustomerSat designed and implemented for Digital Insight contained multiple automated functions:

• selection of customers and closed service incidents from Digital Insight's Pivotal CRM system to be used for surveys (business rules - touch rules - ensured that no customer was surveyed too frequently);

• distribution of personalized e-mail invitations containing secure links to individualized online questionnaires;

• online access for key managers to view service representatives' ratings, verbatim suggestions and trend lines through real-time "dashboards" (interactive analysis and reporting systems), and tools to analyze data to pinpoint customer problems and concerns;

• dissemination of selected results throughout DI using scheduled e-mail reports ("push" reports, standardized reports delivered to managers by e-mail on a pre-arranged schedule);

• notification to the appropriate managers at DI when customers needed immediate attention, using e-mail "alerts."

Using the initial baseline measures, DI's management team established goals for improvements in performance by area. Digital Insight's management incentive plan - for the entire management team, not just the customer-facing organizations - was tied to overall satisfaction score increases.

Using feedback to drive action and improve results

Digital Insight now uses online client feedback to drive action through a combination of processes, practices, and technology. Client feedback generates alerts to the appropriate individuals in the Digital Insight organization, notifying them immediately if clients are dissatisfied. Interactive dashboards allow managers and supervisors to pinpoint problems and opportunities. Push reports deliver up-to-the-minute statistics, trend lines, charts and graphs of survey results directly to the e-mail boxes of Digital Insight managers.

Digital Insight managers use these services to: recognize and address client concerns; reward and recognize Digital Insight customer service staff for outstanding performance; and

Area	Action
Training & Coaching	• Completed service skills program for all customer service and client relations employees. • Implemented monitoring and coaching. • Developed and delivered extensive product and technical training.
Standards & Processes	• Implemented service standards using Apropos automatic call distribution (ACD) system. • Added skills-based routing. • Implemented product specialization by teams. • Implemented additional transaction surveys to guide improvements.
Technology & Resources	• Launched new client site for self-service. • Expanded service capability through Apropos and Pivotal CRM system.

provide targeted training and coaching, including issue-focused cross-departmental training.

As a result of findings from the first survey, four key issues were identified as drivers of customer dissatisfaction with the current level of customer service:

1. Lack of standards for answering and returning calls.

2. Inadequate product knowledge of the service staff.

3. Lack of customer service skills.

4. Inadequate follow-up and resolution of issues.

In response to customer feedback Digital Insight took a wide range of actions from late 2000 through 2002 (see chart).

As a result of these actions, Digital Insight enjoyed improved results:

• Customer assessments of service (level of satisfaction on a 10-point scale) improved from 6.5 at Q4 2000 to 8.0 in Q2 2002

• Customer assessments of account management (level of satisfaction on a 10-point scale) improved from 6.4 in Q4 2000 to 7.7 in Q2 2002

• Referenceable client percentage improved from less than 30 percent at year-end (YE) 2000 to 75 percent by YE 2001 and to 85 percent by YE 2002.

In addition to these overall results:

• Improved service times meant that 97 percent of service calls were handled before customers abandoned the call, up from 84 percent previously.

• The abandon rate for calls dropped from 12 percent to 3 percent.

• The average queue time dropped from two minutes to 20 seconds.

• The average number of days to resolve an incident dropped by 50 percent.

• The average incidents outstanding dropped by 100 percent.

Scores and performance have continued to improve since 2002.

Impact on client loyalty

Digital Insight's service quality improvements gradually showed up in the company's quarterly client renewal scorecards, tools used by account managers to project the likelihood of client renewals. The quarterly scorecards define risk levels for each client scheduled to renew their Digital Insight services, and identifies possible drivers of non-renewal: change of DP vendor; pricing; merger or acquisition; IT interface; service/support; product; other.

In prior years, the service/support factor had contributed to non-renewals of customer contracts. But for 2002 through 2003, service/support did not contribute to non-renewal in any quarterly renewal scorecard.

Measuring ROI of customer feedback

Digital Insight's revenue is divided into three categories:

1. New - revenue from new contracts won during the year (i.e., revenue from new clients plus new products sold to existing clients).
2. Renewal - revenue from existing contracts retained during the year.
3. Lost - revenue from existing contracts lost during that year.

Of these, the largest category is revenue from renewals; the smallest category is revenue from lost customers. The process used to measure ROI was as follows:

• Estimate changes in revenue by category due to actions taken as a result of customer feedback.

• Identify full costs of customer feedback programs, internal and external, initial and ongoing.

• Estimate total change in gross profit attributable to the changes in revenue.

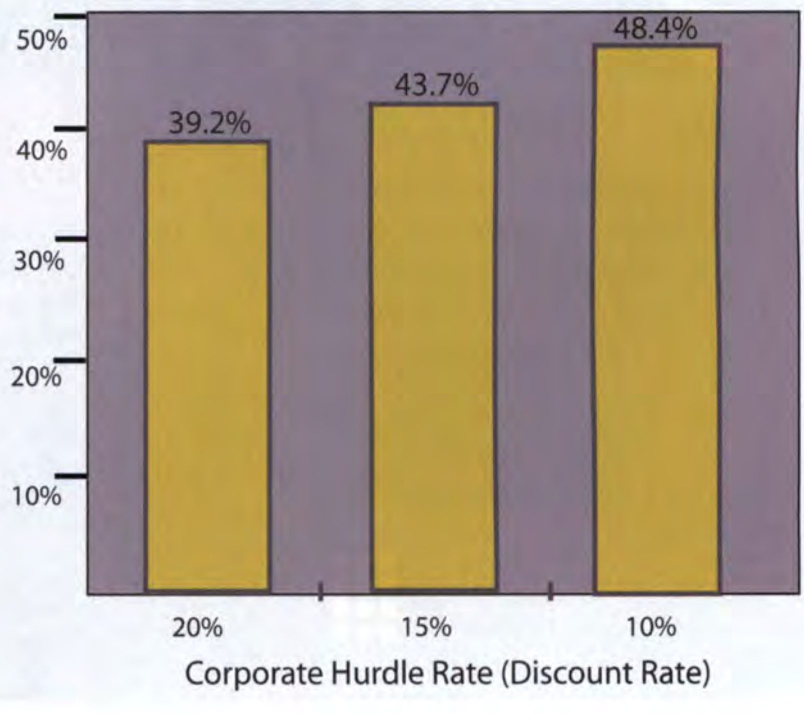
• Subtract full program costs from the change in gross profit to determine net profit changes.

• Compute the return (change in net profit) on investment (full program costs). (Refinements to this process include consideration of depreciation, amortization, interest and taxes.)

Revenue impact assumptions

The team took a conservative approach in their assumptions of the impact of customer feedback processes on revenues. From a percentage standpoint, the impact of customer feedback processes on contracts that would otherwise have been lost was

Figure 2
Annual ROI of Digital Insight Customer Feedback Program
(Three-year time horizon)



greatest, for two reasons. First, the feedback processes enabled DI staff to promptly recognize and address concerns causing client dissatisfaction. Second, the base of lost customers was relatively small to begin with.

In contrast, the percentage impact on new customers was smallest, since these sales benefit less directly from improvements in customer service. Revenues from new customers benefit indirectly, through stronger and more favorable word of mouth about Digital Insight. Finally, the impact on existing clients was intermediate between the other two.

The following assumptions were made concerning the impact of the customer feedback program on revenue:

• 2 percent increase in revenues from new clients won per year;

• 3 percent increase in revenues from retained clients per year;

• 5 percent decrease in revenues from lost clients per year.

These assumptions alone had significant implications for Digital Insight's growth rate. Given these assumptions, over a five-year period, Digital Insight's compound annual growth (CAGR) was five percentage points higher - 44 percent vs. 39 percent - as a result of improved customer feedback processes and the resulting customer loyalty (Figure 1).

Cost assumptions

The next step was to estimate costs of the client satisfaction programs. Costs included a percentage of management salaries as well as fees for online and professional services to CustomerSat.

Most costs of customer service staff and infrastructure would have been incurred with or without customer feedback programs, and so were excluded from the analysis. Real-time customer feedback allows customer service to take actions faster than if feedback was not available, allowing greater productivity and effectiveness with the same staff. However, savings due to increased employee efficiency were not included in cost assumptions.

Investment assumptions

To calculate ROI, two financial investment assumptions are required: the time horizon of an investment and the interest rate at which future cash flows are discounted (discount rate). A three-year time horizon was selected. This is shorter than the five-year time horizon widely used by accountants for depreciating physical assets, but appropriate for a fast-paced, technology-intensive business such as Digital Insight's. A range of three discount rates with 15 percent as the mid-point – 10 percent, 15 percent and 20 percent – were used to calculate ROI. The shorter the time horizon and higher the discount rate, the lower the ROI would be.

Calculating return on investment

ROI is the net present value (NPV) of a series of cash flows - here, increases in gross profit - divided by the present value of the investment required to generate those cash flows. The NPV of a series of cash flows is the present value of those cash flows less the initial investment, where:

$$\begin{aligned}&\text{Present Value} =\\&(\text{Cash flow at end of year 1})/(1+\text{interest rate}) +\\&(\text{Cash flow at end of year 2})/(1+\text{interest rate})^2 +\\&(\text{Cash flow at end of year 3})/(1+\text{interest rate})^3 + \ldots\end{aligned}$$

Using a 15 percent/year discount rate and a three-year time horizon, the present value of the cash flows was approximately $1.2 million. The present value of the required investment (which consisted of an initial investment plus incremental investments each year over three years) was approximately $840,000. At 15 percent, the ROI was approximately 44 percent. Figure 2 measures Digital Insight's ROI at three different discount rates. The fact that ROI far exceeds DI's discount rate (cost of capital) indicates that the investment in customer feedback systems is well worth making.

These measures do not take into account other benefits of real-time feedback that further contribute to ROI, including direct cost savings from more streamlined service and support operations, and product, market, and competitive intelligence.

Strong by any measure

Digital Insight now has a solid baseline of data it can use with confidence to compare its customer service and client relations with those of any financial services organization worldwide.

By any financial measure, Digital Insight's ROI on its customer feedback programs was very strong. "These feedback programs, with a relatively low investment on our part, make our customer-facing staff much more effective," Koch says. "We feel more informed about what our customers want, and the real-time feedback allows us to take faster and better action to deliver on those wants. We feel that the ROI justifies our investment in service quality and feedback." | Q

customer satisfaction research

The critical link between satisfaction, loyalty and problem management

By Alan Dutka
and Lauren Wagner

Business success in today's competitive environment requires that the seller adopt the customer's point of view. A successful product or service must satisfy the customer's increasingly demanding requirements. Two major reasons for initiating customer satisfaction and loyalty research are 1) to clearly understand the perspectives of the customer and 2) to generate the information required to take necessary corrective action.

Corrective action often results in tactical changes. These changes are based on the company's achievement with regard to a series of critical performance attributes that influence satisfaction and loyalty. A well-designed research project will transcend tactical issues and also provide the basis and justification for proactive strategic improvements. Among the most important strategic issues are problem notification and resolution.

A company will dramatically increase customer satisfaction and loyalty when it adopts the following strategy:

1. Don't create problems for customers.
2. Proactively notify a customer if a problem does occur.
3. Resolve the problem quickly and decisively.

The successful implementation of this strategy is difficult. NSRC's research indicates that between 40 and 50 percent of a company's customers have experienced at least one problem during any six-month period. Proactive notification of the problem is provided in about 60 percent of the cases. Only about half of the problems are resolved to the customer's satisfaction.

Minimizing customer problems is not easy. The process of acknowledging and rectifying problems may require a culture change within the company. Research must provide the evidence and justification that this effort will lead to a dramatic increase in customer satisfaction. Our firm's customer satisfaction and loyalty research process captures information about the number of problems arising in business transactions, the amount of proactive notification of problems and the number of problems resolved.

A representative example is used in this article to show the critical importance of the three-step process of minimizing problems, notifying the customers of problems as they occur and quickly resolving problems. The example is based on a recent telephone

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interviewing project. A total of 2,301 customers of a transportation/shipping company were interviewed. Overall satisfaction was measured on a 5-point scale (1 = very dissatisfied and 5 = completely satisfied).

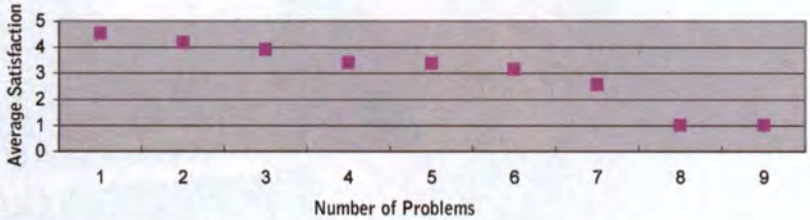
Problems create more problems

Table 1 and Figure 1 illustrate how the average satisfaction score changed as the number of problems increased. Customer satisfaction declines dramatically as the number of problems experienced increases from zero to three. The differences at each step are statistically significant at the 99.99 percent confidence level. A plateau is then reached. Adding a fourth or fifth problem decreases the average satisfaction score, but not by an appreciable amount. As the number of problems increases beyond five, the satisfaction score deteriorates completely.

Table 1
Decrease in Customer Satisfaction as Number of Problems Increases

Number of Problems	Average Satisfaction Score	Number of Respondents
0	4.5203	1,351 (58.7%)
1	4.1812	585 (25.4%)
2	3.9028	216 (9.4%)
3	3.3933	89 (3.9%)
4	3.3714	35 (1.5%)
5	3.1429	14 (0.6%)
6	2.5556	9 (0.4%)
7	1.0000	1 (0.0%)
8	1.0000	1 (0.0%)

Figure 1



Here are a few actual customer comments regarding the relationship between satisfaction, loyalty and problems:

"The reason I gave them a poor rating is because of the kind of mistakes that they make. It's critical that those things don't happen. Mistakes happen because people don't pay attention."

"The problems are widespread. It comes down to paying attention to the customer's needs."

"Fix the problems or we're out of here. We won't use them anymore."

"If you want to continue doing business with me, someone needs to do something about all of these problems; otherwise, I'll be taking my business elsewhere."

"To increase my satisfaction, you should pay more attention to customers. Put effort into understanding the problem and not turning away from problems."

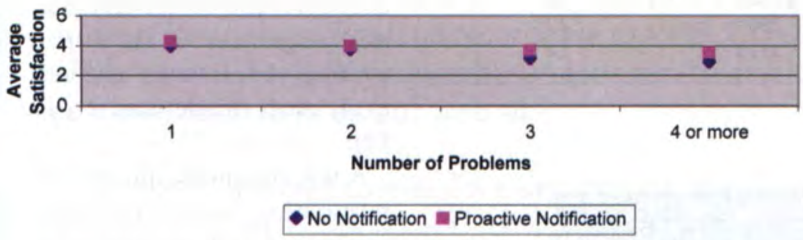
"It really made me mad. When the company shows up after 5:00 p.m., I have to pay my guys overtime so they will stay and load up the truck. I was here until 8:00 p.m. one time myself. We call ahead and give them a plenty big enough window that they should be here on time."

The shipping industry is plagued by numerous potential problems. Customers in another industry may exhibit less tolerance for problems. Table 1, however, illustrates a general pattern that is repeatable in many industries. The deterioration as prob-

Table 2
Increase in customer satisfaction with proactive notification of problems

	Proactive Notification	Average Satisfaction Score	Number of Respondents
Problems = 1	No	3.9708	137
	Yes	4.2884	371
Problems = 2	No	3.7600	75
	Yes	3.9826	115
Problems = 3	No	3.1702	47
	Yes	3.6765	34
Problems > 3	No	2.9210	38
	Yes	3.5294	17

Figure 2



lems are created and the number of problems needed to reach the plateau will differ depending on the nature of the industry.

Proactive notification is critical when a problem occurs

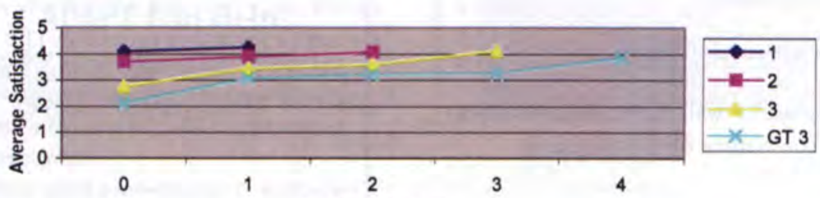
If a problem does arise, proactive notification of the situation is expected. For customers experiencing at least one problem, the average satisfaction score when proactive notification of the problem was given was 4.1601. When no proactive notification was offered, the average satisfaction score dropped to 3.6566. This huge difference in satisfaction is statistically significant at better than the 99.99 percent confidence level.

Table 2 and Figure 2 illustrate how average satisfaction scores increase as problem notification is implemented. For example, the average satisfaction score for customers with exactly one problem was 4.2884 when proactive notification was given and 3.9708 when no notification was provided. The difference is statistically significant at the 99.99 percent confidence level.

Table 3
Increase in Average Customer Satisfaction as Problems are Resolved

	Problems Resolved	Average Satisfaction Score	Number of Respondents
Problems = 1	0	4.0966	238
	1	4.2392	347
Problems = 2	0	3.7101	69
	1	3.9014	71
	2	4.0789	76
Problems = 3	0	2.7778	27
	1	3.4687	32
	2	3.6250	16
	3	4.1429	14
Problems > 3	0	2.0909	11
	1	3.0556	18
	2	3.2000	5
	3	3.2500	12
	4	3.8333	12

Figure 3



Customer satisfaction scores are always greater, regardless of the number of problems, if proactive notification is given. The differences in Table 2 are all statistically significant with a confidence level of at least 95 percent.

Here are representative comments from customers discussing the need for adequate problem notification and how it effects satisfaction and loyalty:

"The number one issue is that they should call me if there is a problem. My customer should not be calling me and telling me what the problem is."

"If they are going to be later dropping off a shipment, it would be nice if they would notify me, so that I don't have to pay people overtime to sit around and do nothing. They never call to say they are going to be late. I mean, at least have the decency to call me and notify me."

"They don't contact me when there is a problem. I can handle most of the problems that come up. I just want some respect from the company."

"The issue of proactive notification needs work. They don't notify us when something is going wrong or what's being done to fix it."

"We're the last to know about a problem and we should be the first one to know. This has to change if they want to continue with our business."

Problem resolution positively impacts customer satisfaction

Customers expect problems to be resolved. Table 3 and Figure 3 illustrate how average satisfaction scores increase as the number of resolved problems increases. For example, the 585 customers who experienced exactly one problem are divided into two groups: those whose problem was resolved and those whose problem was not resolved. The average satisfaction score is higher when the problem was resolved (4.2392) when compared to the average when the problem was not resolved (4.0966). This difference is statistically significant at the 98 percent confidence level.

As the number of problems increases, the direction of average satisfaction is consistent as the number of resolved problems increases. The changes are not always statistically significant because of small sample sizes associated with a large number of problems. On the other hand, the change from resolving two problems to resolving three problems when three problems are experienced (3.6250 vs. 4.1429) is statistically significant at the 94 percent confidence level even with relatively small sample sizes (16 and 14).

A few comments illustrate the relationship between satisfaction, loyalty and problem resolution:

"I won't complain because they take care of all the problems right away."

"The satisfaction score is low because they do not really know how to deal with problems."

"My satisfaction would be higher, but they do not solve problems in a timely fashion."

Avoid and resolve problems

This research clearly demonstrates the value of both avoiding problems and proactively resolving problems when they do occur. As would be expected, customer satisfaction scores are significantly higher when no problems occur. Reality is that problems do occur, even in the best organizations. This research reveals that a substantial comeback in customer satisfaction is possible, but only if problems are resolved quickly. By listening to its customers, a company can learn both what problems exist and at what rate they are resolved. The positive impact of proactive problem resolution is good news for companies striving to maintain a base of loyal customers. | Q

Response scales for customer satisfaction research

By Keith Chrzan and Joey Michaud

The choice of a response scale is one of the most contentious debates in customer satisfaction research and one of the least crucial. Academic research on scale design is voluminous but not always relevant. Much of the published work on attitude rating scales comes from the field of public opinion research and not on satisfaction research or even on marketing research. Nor is this academic research consistent. We learn, for example, that more scale points are better than fewer; that two, five, nine, 10, 11, and 101 are optimal; that two are not enough, and that there is no relationship between scale quality and the number of scale points.

However, some broad themes and specific findings do emerge. Maritz Research's experience and testing of satisfaction scales leads to the following recommendations about satisfaction response scales.

What scales should accomplish

Response scales for overall customer satisfaction meet a variety of objectives. These scales:

- reliably measure the construct of customer satisfaction;
- validly measure the construct of customer satisfaction;
- provide discriminating measures;
- permit interval-level statistical analyses;
- apply to a wide variety of product and service categories;
- are appropriate for mail, telephone, Internet and personal data collection;
- are easy for respondents to understand and remember during interviewing.

This article concerns only overall satisfaction scales. Other measures (such as performance scales for product or service attributes, agree/disagree scales, etc.) are outside the scope of this article.

Response scale properties decisions

Our recommendation depends upon five major factors:

A. Mode of administration

Sometimes respondents see a scale (paper-and-pencil surveys, Web or PC-based surveys) and sometimes they just hear it (telephone and interactive voice response surveys). Humans process visual and aural information differently. Some scales are more confusing when heard than when seen, which can lead respondents to answer the same question differently in different data collection modes. For this reason, some of the recommendations depend on whether a scale is to

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be perceived visually or aurally.

B. Scale balance

Balanced scales have equal numbers of positive and negative points: completely satisfied; mostly satisfied; mostly dissatisfied; completely dissatisfied. Although there are exceptions, a best practice with respect to balanced scales is that the use of modifiers should be symmetrical on the positive and negative ends of the scale.

Unbalanced scales attempt to get greater discrimination on one side of the scale than on the other. If past experience suggested that most respondents are satisfied with a certain product or service, a researcher might want to "stretch out" the positive side of the scale, as in this extreme example (five positives and only two negatives): completely satisfied; very satisfied; mostly satisfied; somewhat satisfied; barely satisfied; mostly dissatisfied; completely dissatisfied.

Whether a scale should be balanced or unbalanced usually depends on whether we're measuring a unipolar or a bipolar concept of satisfaction. A unipolar satisfaction scale might range from "not satisfied" to "completely satisfied" (i.e., it doesn't measure any more extreme dissatisfaction at all). In contrast, a bipolar scale would range from "completely dissatisfied" to "completely satisfied" (i.e., it measures extremes of both satisfaction and dissatisfaction).

When we don't know ahead of time whether most respondents will tend to be satisfied or dissatisfied, or if we expect high levels of dissatisfaction, a balanced bipolar scale is appropriate. If we know from past experience to expect low levels of dissatisfaction, an unbalanced unipolar scale will be better. In our firm's experience, most studies show low levels of dissatisfaction, so our most frequent scale recommendation is for an unbalanced satisfaction scale.

Some people think that satisfaction and dissatisfaction should be measured separately and are different entities. Although Maritz has observed that satisfaction and dissatisfaction may sometimes have different drivers, and there may be nonlinear relationships between satisfaction and other variables, we have seen no compelling reason to measure them separately.

C. Midpoints

A midpoint communicates neutrality on a balanced scale. "Neither satisfied nor dissatisfied" serves as the midpoint in this balanced bipolar scale: completely satisfied; mostly satisfied; neither satisfied nor dissatisfied; mostly dissatisfied; completely dissatisfied.

There seems to be no difference in quality between scales that have a midpoint and those that do not. For bipolar scales, however, Maritz Research follows the advice of Sudman and Bradburn (1982) to "include the middle category unless there are persuasive reasons not to do so." Krosnick (in press) suggests the same.

D. Number of scale points

Despite the strong opinions of some scale enthusiasts, there just isn't powerful empirical evidence that a single number of scale points are always the best. A literature review by Cox (1980) summarizes the consensus regarding self-administered surveys: "Seven, plus or minus two, appears to be a reasonable range for the optimal number of response alternatives." Internal research has not indicated a consistent difference in quality between 5- and 10-point scales. Krosnick (in press) finds that 5-point scales have the greatest test-retest reliability in paper-and-pencil surveys. Maritz' experience with mail studies has shown that 5-point scales provide better dispersion of responses (and are, therefore, more discriminating) than other scales. We expect these results would generalize to other visual survey modes (e.g., PC or Web-based).

The findings about the superiority of 5-point scales apply specifically to visually perceived scales and may or may not generalize to questions that respondents hear rather than see. Ten-point response scales are common in telephone surveys and have also been found to provide some advantages: greater statistical precision, statistical power, and room for improvement (Wittink and Bayer, 1994). We have also seen evidence that respondents from some ethnic groups shy away from using the extreme endpoints and may answer more accurately if they have a greater number of scale points from which to choose. Hence, while our basic recommendation is to use 5-point scales, we are comfortable using 10-point scales for some surveys, particularly those conducted via telephone.

E. Scale anchors

Marketing research convention, Maritz Research's experience, and recent academic work (Krosnick, in press) suggest that 5-point scales be fully word-anchored. Similarly, convention and our experience with the difficulty of administering more than about five verbally anchored scale points support word anchoring only the endpoints of 10-point scales.

Figure 1

Preferred Scale - Visual mode (paper, PC or Web-based, personal with "show card")

Overall, how satisfied were you with __________? Please check only one box

Not at All Satisfied	Slightly Satisfied	Somewhat Satisfied	Very Satisfied	Completely Satisfied
☐	☐	☐	☐	☐

Preferred Scale - Aural mode (CATI, IVR)

Overall, how satisfied were you with __________? Would you say that you were not at all satisfied, slightly satisfied, somewhat satisfied, very satisfied, or completely satisfied? [RECORD ONE ANSWER.]

Recommended satisfaction response scale

For the reasons above, Maritz prefers a 5-point fully-word-anchored unbalanced response scale for measuring overall satisfaction. The preferred scale works well in both aural and visual survey modes (Figure 1). We also recommend that it be presented without associated numbers (see section on other considerations).

Acceptable alternatives

There are situations when other scales may be appropriate.

A. Bipolar scale

When we don't know how responses may be distributed or when we suspect generally lower levels of satisfac-

Figure 2

Alternative Bipolar Scale - Visual mode

Overall, how satisfied were you with __________? Please check only one box.

Completely Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Completely Satisfied
☐	☐	☐	☐	☐

Alternative Bipolar Scale - Aural mode

Overall, how satisfied were you with __________? Would you say that you were completey dissatisfied, somewhat dissatisfied, neither satisfied nor dissatisfied, somewhat satisfied, or completely satisfied? [RECORD ONE ANSWER.]

tion in a particular study, it may be prudent to use a bipolar scale. Recommended bipolar scales for visual and aural presentation are shown in Figure 2.

B. 10-Point Scale

Figures 3 and 4 show unipolar and bipolar versions of the 10-point scale Maritz Research recommends for telephone interviewing.

Figure 3

Alternative 10-Point Unipolar Scale - Aural mode

Please rate your overall satisfaction with _____ on a scale of 1 to 10, where 1 means "not at all satisfied" and 10 means "completely satisfied." You may use 1 or 10 or any number in between to answer.

Figure 4

Alternative 10-Point Bipolar Scale - Aural mode

Please rate your overall satisfaction with _____ on a scale of 1 to 10, where 1 means "completely dissatisfied" and 10 means "completely satisfied." You may use 1 or 10 or any number in between to answer.

Other considerations

A. Presentation of the scale

In an aural data collection mode (telephone), presentation refers to the wording of the question. In a visual mode (mail, Internet, personal interview with "show card"), it means how the scale is configured (e.g., horizontally or vertically, symbol used to express categories, highest category at the right or left, etc.).

In a visual mode, the recommended response scale is presented horizontally and ordered low on the left to high on the right. There is little evidence supporting either low-to-high or high-to-low ordering. Sudman and Bradburn (1982) generally recommend low-to-high, and our firm's experience provides mild evidence agreeing that a low-to-high ordering is better.

Overall satisfaction is usually measured alone, and not in a battery of like-scaled items, so a vertical ordering (from low satisfaction at the top to high satisfaction on the bottom) may also be used:

not at all satisfied;
slightly satisfied;
somewhat satisfied;
very satisfied;
completely satisfied.

When presenting endpoint-only anchored scales visually, whether or not numbers are associated with the unlabeled categories is open to debate. Maritz' experience and internal research show that responses may be different with and without the numbers, but not which measure is more valid or reliable.

B. Multi-language surveys

If a survey is to be translated into multiple languages, the meaning of verbal scale anchors may not translate perfectly. Since this problem is more likely to occur as the number of verbal anchors increases, consider using verbal anchors only for the endpoints of multi-language scales.

C. Consistency in administration

The human brain is good at many things but measuring its own internal mental states isn't one of them. Compared to a micrometer, an odometer or a Breathalyzer, the brain is a poor measuring device indeed. As a result, minor differences in how rating scales are administered can cause large differences in study results. Asking the same scale of similar respondents in phone and mail surveys routinely produces sizable differences in both mean ratings and the distribution of ratings. Scales with different anchors or even identical scales administered in different ways or in different contexts can return dramatically different results. Any time a scale is used in tracking, or when a scale will be used in two separate studies and results on it compared, any of the above differences plus others, can wreck comparability.

Much more important than which scale you use is that you maintain wave-to-wave consistency. Before any changes are made to a scale or its presentation, it is wise to conduct a side-by-side test to see how the change will affect the results.

Variety of objectives

A good satisfaction response scale must meet a variety of objectives - most importantly valid and reliable measurement of the satisfaction construct. A good scale will also be discriminating, permit interval-level statistical analyses, and be easy for respondents to understand. Maritz Research prefers response scales that are applicable to a wide variety of product and service categories and

Figure 5

Not at All Satisfied	Slightly Satisfied	Somewhat Satisfied	Very Satisfied	Completely Satisfied
☐	☐	☐	☐	☐

Figure 6

Completely Dissatisfied	Somewhat Dissatisfied	Neither Satisfied nor Dissatisfied	Somewhat Satisfied	Completely Satisfied
☐	☐	☐	☐	☐

can be used in all data collection modes.

Our basic recommendation is a 5-point fully-word-anchored unbalanced scale (appropriate in both visual and aural modes) is shown in Figure 5.

If low levels of satisfaction are anticipated, a 5-point fully-word-anchored balanced bipolar scale (Figure 6) may be used (appropriate in both visual and aural modes)

In telephone surveys, 10-point satisfaction scales have been shown to provide some advantages. Ten-point scales are also useful with certain ethnic groups who shy away from using the extremes, and can be helpful when a study is being conducted in multiple languages (fewer verbal anchors to translate). For the 10-point scale, Maritz offers unipolar and bipolar alternatives, with only the endpoints anchored:

Unipolar
1 = Not at all satisfied 10 = Completely satisfied

Bipolar
1 = Completely dissatisfied 10 = Completely satisfied

These recommendations result from an extensive literature review, internal research and considerable experience with customer satisfaction research. However, Maritz recognizes that there may be good arguments supporting other satisfaction response scales. When data comparisons are important, we recommend using the existing scale. The ability to compare data from identical scales far outweighs any benefit from response scale redesign in nearly all situations. | Q

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Note: Full bibliography available on request.

Similar aim, different approaches

By Doug Berdie

Fundamental differences exist between consumer and business-to-business customer satisfaction research. Failure to attend to these differences has resulted in many expensive measurement systems that do not address real business needs.

The core survival strategy of companies who sell b-to-b is to keep their key clients and insure that the revenue from these clients remains steady or increases. Because the "80/20 rule" generally applies to b-to-b companies, they pay less attention to their smaller accounts (unless it is obvious these are major growth candidates) and devote much more effort to their key accounts. The key accounts often have personal sales reps assigned to them, are "wined and dined," participate in client review sessions, and are tracked with great care by upper management.

The core survival strategy of consumer-oriented companies is to maintain revenues across the entire customer base and to, at least, retain market share within the industry. Few customers are identified individually and, hence, little attention is paid to specific customers.

(The lack of focus on individual customers is not a hard and fast rule and is more readily apparent in some consumer-oriented companies [e.g., consumer packaged goods companies whose individual customers rarely account for major revenue] than in others [airlines, for example, and other companies that have devoted significant effort to CRM and do focus on individual customers].)

A comparison of consumer and business-to-business customer satisfaction research

Growth strategies

The core growth strategy for many b-to-b companies is to replace many small accounts with a few larger ones. They would rather see 80/20 move more toward 70/30 or 60/40. To accomplish this, much effort is expended on identifying specific accounts that have the potential to become major accounts. Again, top-to-top meetings are held with these candidates to see how the relationship can be expanded. Pricing concessions and other tactics are discussed for furthering the relationship.

The core growth strategy for most consumer-oriented companies is to increase the number of customers it has. Again, in most cases, little effort is made to deal with customers on an individual basis. Mass media

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advertising and promotions are much more commonly used techniques.

How these differences influence the measurement of customer satisfaction

If one's focus is on retaining individual, specific customers, one will want to know what is important to those customers and how well they feel they are being served - one by one. This necessitates a research process in which: 1) the identity of each survey respondent is known; 2) what is important to each survey respondent is known - and tied back to that person's identity; 3) levels of satisfaction with supplier performance are known - and tied back to that person's identity; and 4) the exact details of areas of dissatisfaction are known - and, again, tied back to that person's identity. It will not suffice to have "overall measures" of what is important across all customers, nor will it suffice to know satisfaction levels across all customers. If what is the single most important purchase criterion to the most critical customer is only ninth-most important across the entire sample, and individual responses are not tended to, insuring that the important customer is totally satisfied with this element of experience may not be deemed a high priority - putting this critical customer at risk.

However, one cannot (in a practical sense) pay attention to the individual responses of millions of customers across a typical consumer market. Here, it does make sense to look at what is most important across the entire customer base and to see how well satisfaction scores relate to the most important attributes of the experience.

What this means is that b-to-b customer satisfaction measurement systems should:

1. Ask customers for permission to tie their name to their responses - and to allow the coupled information to be shared with the supplier and its sales team. (This question is best asked at the end of the survey, so it will not bias responses, and permission, typically, is granted in more than 90 percent of cases - often enthusiastically: "Please do tell them!")

2. Contain appropriate ways to measure what is important to the customer - with such measures having validity and reliability at the individual level. Commonly-used factor analysis and regression-based techniques for assessing what is important to customers are ill suited to b-to-b studies because they only reflect what is important to customers as a whole, not what is important to specific, individual customers. Experience shows that importance rating scales are also of limited value given the tendency of respondents to rate most, if not all, attributes "important." Instead, "Indicate the two most important" (of a longer list), pairwise trade-off questions ("Which is more important, A or B, B or C, A or C?" etc.), rankings (even with their limitations), and other questioning techniques that force some discrimination among attributes work best to determine importance at the individual level.

3. Produce an output that profiles, for each customer, how that customer answered each satisfaction question and which elements of the experience are most important to that specific customer. Elements that are of high importance where satisfaction is low should be highlighted.

Conversely, consumer customer satisfaction measurement systems can:

1. Be done anonymously (or confidentially) because there is little need to relate identities to responses.

2. Use statistical derivations based on regression and other multivariate techniques to measure what is important to customers because subsequent actions aimed at customers will be aimed at them as a whole (or, by segment) and will not be tailored to individual customers.

3. Contain summary reports across the customer base (or, by segments) - again, because actions will not be taken on an individual basis.

Also, the procedures for measuring how effective customer satisfaction improvement initiatives have been differ between b-to-b and consumer settings. In b-to-b settings, financial information about revenues and margins is known for specific customers, and changes in these numbers can be tracked against changes in how the specific customers are treated. Effects on revenues and margins for consumer companies will, again, be tracked on more of an aggregate level.

Implications

Although the intent of both b-to-b and consumer-oriented customer satisfaction systems is to measure performance so that targeted improvements can be made, the techniques and applications used successfully in one domain are not maximally effective in the other.

Historically, many quantitative market researchers have come from consumer packaged goods backgrounds and are steeped in quantitative measures that summarize large numbers of customers. This fact may explain how these techniques have found their way into the b-to-b environment - especially when customer satisfaction measurement became such a lucrative research business. Conversely, many researchers steeped in b-to-b research have relied on qualitative techniques for other types of research and feel uncomfortable tackling customer satisfaction work that may include larger samples than they are used to.

Properly conducted b-to-b customer satisfaction research does rely on a quantitative orientation. It's just that it is not quite the same as that used with consumer-oriented research. B-to-b research cares primarily about specific, individual customers, whereas consumer research cares much more about the customer base as a whole or large-scale segments of it.

Differentiating between b-to-b and consumer techniques also insures that the b-to-b measurement process produces credible, helpful and actionable results. And, meeting these criteria is a necessary ingredient of customer satisfaction measurement systems that actually cause positive organizational change.

The results are credible because 1) customers can see that their individual concerns are known, being examined, and getting addressed - not being lost in averages spread across an entire customer base; and 2) the sales team "believes" the research results because they can see that the results apply to "their customers."

The differentiated results also are helpful because they identify the specific needs of the most important customers (usually those who either now are, or might be, the greatest revenue and/or margin producers), and they show exactly what changes are needed to meet the needs of these customers.

And, these results are actionable because they lead to in-depth, follow-up discussions with the affected customers, who then further elucidate the nature of any problems and point to customer-defined solutions and steps to achieve them.

Finally, use of this customer-centric measurement process for b-to-b customers increases loyalty among the customer base because 1) success stories can be publicized to the entire customer base as they occur from individual customer solutions; and 2) experience has shown that getting customers involved in solving supplier problems makes the customers feel more a part of the supplier organization and their commitment to it increases. | Q customer satisfaction research

A vital link

By Nancy Cook

There is no question that companies that score the highest marks for customer satisfaction are usually the most successful. They work hard to provide prompt and courteous service, assure quality control and timely delivery of products. But companies often overlook one of the most valuable resources in their quest for perfection: their own employees.

Frontline employees are the most immediate link to customers, so they can offer valuable insight from a unique perspective. If problems are brewing, they're usually the first to recognize them, and often, the best equipped to offer viable solutions. Research has shown that when their opinions are truly valued, employees are almost always more satisfied with their jobs. They display high morale and are invested in the success of their company. All of this translates into improved customer service and a payoff - in real dollars - for companies that conduct systematic and formal employee satisfaction research.

Satisfied employees are critical to ensuring satisfied customers

Why formalize employee research?

Staff meetings and feedback forms may be a quick way to gather information on employee satisfaction, but they cannot be relied upon to yield accurate results, especially if the topic is sensitive. Face-to-face meetings do not provide the anonymity necessary for complete honesty, and internal surveys are often worded, distributed and retrieved in such a way that the employee feels unable to express his or her opinion without fear of reprisal.

To obtain the most accurate and reliable employee satisfaction results, a formal method is required. A trained researcher has the ability to conduct research covering any topic, including the most sensitive. The researcher can assure that the information gathered remains absolutely confidential, allowing the employee to feel comfortable giving a completely honest opinion.

Methods of data collection

When anonymity is essential, Web-based or mail surveys are excellent choices for data collection. If employees have access to, and are comfortable using, the Internet, Web-based surveys are the preferred methodol-

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ogy. They provide much faster access to the data and higher, more accurate response rates. With confidentiality in mind, access to Web-based surveys should be secure and password-protected.

Mail surveys can be more costly to administer because of the added expenses of printing and postage. However, if a majority of employees either do not have Internet access or are not adept at using the Internet, a mail survey is the best alternative. To help reduce postage costs, some employers insert the questionnaire as a "paycheck stuffer."

The utilization of a third-party research provider is imperative. While the employer may personalize a letter or e-mail inviting employees to participate in the research, it should be clearly stated that the questionnaire will be returned to and processed by an independent research provider to ensure that responses remain confidential and results unbiased.

Employees will feel more secure knowing that their responses are confidential and will be analyzed collectively with other respondents. Further, there is a greater likelihood that a questionnaire administered by an outside research provider will elicit honest answers and meaningful suggestions. As important, the questionnaire will be professionally designed and contain unbiased questions.

What should I ask?

The focus of the employee satisfaction survey can be as broad or narrow as desired and should include topic areas that can be tracked over time, such as satisfaction with pay and benefits, working conditions and employer relations. This will give the employer a historical picture of how the organization is progressing and provide measurements that can be compared to customer satisfaction tracking data to observe any correlations. At a minimum, an employee satisfaction questionnaire should be administered annually.

In an open-ended format, the employee should be asked how to improve customer interaction, processes and the work environment. Special topics might include feedback on recent changes that have taken place in the organization such as: changes in work hours; a merger with another operation; or a newly instituted dress code. A professional researcher can uncover if the changes have affected employees positively or negatively. Changes also need to be benchmarked so that future surveys can accurately track satisfaction with regard to the change.

Typically, rating questions work well for many of the assessment categories. Following are some categories that are appropriate to include in an employee satisfaction survey:

Satisfaction with:

- the organization's leadership and planning;
- communication within the organization;
- opportunities for advancement and career development;
- the working environment;
- pay and benefits.

Perceptions of:

- the corporate culture;
- how the employee fits with the organization, the image the company projects, and how the organization measures up to employee expectations;
- teamwork and cooperation within the organization and work group.

Rating questions can be presented in a statement format, and should ask the employee to rate their level of agreement or disagreement, as in the following example:

I have the resources and equipment I need to do my job well

Disagree Strongly	Disagree Somewhat	Neutral	Agree Somewhat	Agree Strongly
1	2	3	4	5

For large companies, where sample sizes by department are large enough to ensure the anonymity of respondents, employers should consider having employees not only rate their own department on various attributes, but also provide comparative ratings based on how they perceive and interact with other departments. This gives a broader perspective of how the organization functions and how employees relate to one another cross-functionally.

To gauge level of commitment, the employee may also be asked if they intend to establish a career with the company and if they would recommend the company to family or friends.

Relevant demographic questions for classification and analysis purposes might include: length of time employed with the company; age; department; and gender.

Demographic questions should not be used as a means to identify specific employees. Rather, they serve as a means for looking at company-wide demographic breakdowns and should maintain anonymity. For example, responses from a particular department should not be identified if there are not enough employees within that department to ensure anonymity.

Find ways to improve

Since satisfied employees are more productive, provide better customer service and are more committed to the organization, the primary objective of conducting the research is to find ways to improve employee satisfaction. Action plans can be developed within organizations to improve operations, develop training courses, enhance working conditions or facilitate better working relationships. Research findings can guide initiatives to improve employee satisfaction by pinpointing problem areas and, once the problems are remedied, the organization will also begin to see a positive impact on customer satisfaction.

The results of employee satisfaction research can be shared with management and, where appropriate, all employees. Cross-functional teams of employees can be created to address problem areas and employees can be encouraged to provide input on decisions that affect them.

The results of employee satisfaction surveys can often be used as a public relations tool. What better way to recruit and retain employees than by sharing actual feedback with the press and employment agencies, touting the company as a great place to work? In an industry such as health care, where employee turnover is high, employee satisfaction research can lead to actionable outcomes directly impacting retention and recruitment.

Employee retention is good for the company and good for the customers. Research among financial institutions has shown that customers greatly value personal service. When a customer develops a relationship with an employee at a bank, they are more apt to be loyal to that institution. It can be safely said that retaining the best employees helps build relationships with customers and helps build business. Employee retention = customer retention.

Follow-up research

If research identifies an area of concern but fails to identify the root cause of the problem, additional in-depth research may be required. This may involve conducting another survey with more targeted objectives, conducting one-on-one depth interviews, or holding focus groups among employees who can provide more insight into the issue or problem.

For example, research may identify that employees in the billing department are not provided with adequate equipment to properly do their jobs. A problem area is pinpointed that is department-specific, yet it is not detailed enough to offer concrete solutions. Additional depth interviews with members of the billing department might uncover that there are not enough printers to handle the volume of statements generated at the end of the month. This causes frustration that spills over to customers who interact with the department or receive their bills late. By allocating additional resources to increase the number of printers, satisfaction improves for employees and customers.

Employees as a link to customer satisfaction

Routine employee satisfaction research is a vital component of the most successful customer satisfaction programs. Without it, companies miss an important piece of the customer satisfaction and retention puzzle. Employees are the ambassadors of the company they work for, and are instrumental to its success or failure. They often hold the key to company-customer relationships because, to the customer, the employee is the company. If customer satisfaction is important to an organization, measuring and improving employee satisfaction should be one of its top priorities. | Q

Broaden your view

By Stephen J. Gill
and Laurence N. Smith

There's an old joke about a man who was asked why he was staring at the ground under a streetlamp. "I'm looking for my house key," he responded. When asked if that was where he dropped it, he said, "No, but this is where the light is."

We get a similar sense from the way many companies evaluate their customer service. They collect the data that is easiest for them to collect, rather than the data that is most useful for improving the customer experience. Comment-card or call-center data or even customer surveys, while part of the picture, cannot describe the total customer experience, nor do they indicate what to do to increase customer satisfaction and loyalty. At best, these measures are an indication of the attitudes of some customers who had either very good experiences or very bad experiences. At worst, these measures are highly misleading and could result in a waste of valuable resources with no appreciable gains for the company.

Accurate and useful data about the customer experience can only come from multiple sources that address all aspects of the organization that influence customer attitudes and behavior. A customer's attitudes about a restaurant experience are affected by more than just the waitperson. Similarly, a shopper's view of a grocery store experience is affected by more than just the availability of products on the shelves.

Measure the total customer experience

A customer experience

Sally had only a short time for lunch. She pulled into the drive-through at a local fast-food restaurant. The line was long and moving very slowly. Sally reached the speakerphone after 10 minutes in the line. She had been looking forward to a hot, tasty meal, but with only 15 minutes left to eat her lunch and drive back to her office, she was getting anxious and annoyed. An employee came on the speakerphone and rattled off a short, unintelligible speech about new items they were promoting. He did not apologize for the long wait, nor did he explain how long it would take to have her order filled. Sally lost her appetite. She drove away without placing an order.

Sally isn't going to stop at the restaurant counter to fill out a comment card and she isn't going to phone the company's call center to complain about the restaurant. But she will think twice about going back there again and she will complain to her co-workers about the

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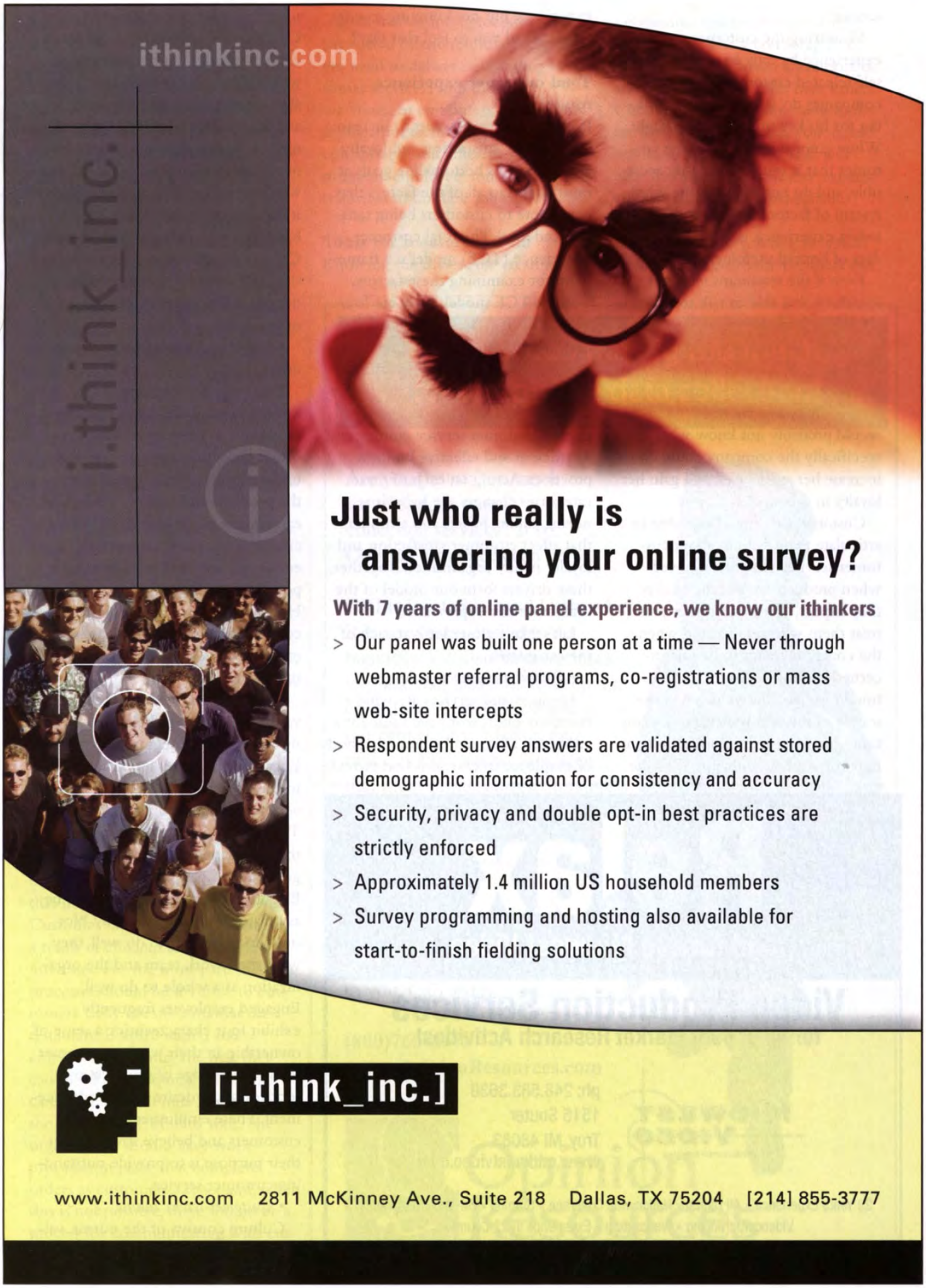
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service.

Measuring the customer service experience by only hearing from self-selected customers, as many companies do, is like the man looking for his key under the streetlight. When companies focus on the customer that is visible and easily accessible, and do not examine the whole system of factors that affect the customer experience, they end up with data of limited usefulness.

Even if the restaurant manager somehow was able to talk to Sally directly, it is unlikely that Sally could communicate what the company needs to know. Of course, she would be aware of her dissatisfaction with service at the restaurant but she would probably not know what specifically the company could do to increase her satisfaction and gain her loyalty in the future.

Customers are not always able to articulate their feelings about customer service. They are annoyed when products are not the quality they expect, when employees don't treat them with respect, and when the company seems to be unconcerned about their needs. But customers are not always aware of the source of this annoyance. How many times have you left a store, restaurant, hotel or airplane, unhappy with the experience but not knowing exactly what caused you to feel that way?

Total customer experience model

If a company truly wants to increase its customer satisfaction and loyalty and achieve its bottom-line goals, it must attend to all of the factors that contribute to customers being satisfied and loyal. The total customer experience (TCE) model is a framework for examining these factors.

In the TCE model, there are four categories of factors that drive a company towards outstanding customer service: 1) desirable and available products and services; 2) competent and engaged employees; 3) an aligned customer service culture; and 4) efficient and effective business processes. Acting on each of these categories changes the behaviors, norms, values, beliefs and attitudes that affect customer satisfaction and loyalty in any organization. Together, these drivers form our model of the total customer experience.

Let's take a closer look at each of the categories.

• *Product and service quality*

Products and services are what a company offers that have value for a customer. They can be tangible goods or employee interactions that provide something the customer wants. Customers want products and services that fulfill the purpose for which they were designed, are reliable, are attractive, and are available and accessible, and at a fair price. A new car that is attractive, meets the need, and is affordable to a customer won't create satisfaction and loyalty if it isn't available for six months. Or a bank that offers a high-interest-rate CD won't achieve customer satisfaction and loyalty if the minimum deposit is beyond the financial reach of that customer.

• *Employee competency and engagement*

Employee competency is the knowledge and skills that employees must have to effectively deliver customer service. Competent employees understand customers' needs, know the products and services offered, and can communicate effectively with customers. In short, competent employees are capable of creating a positive experience for customers. However, they won't do this on a consistent basis unless they are also engaged fully in providing outstanding customer service.

Employee engagement is the motivation and desire to help the company achieve its strategic goals. Engaged employees feel connected to the organization. They are loyal, committed, satisfied and productive. They have a sense of responsibility to their work and their employer that goes beyond pay and benefits. Engaged employees are proud to be associated with the company. Not only do they want to do well, they want their work team and the organization as a whole to do well. Engaged employees frequently exhibit four characteristics: a sense of ownership in their work, a customer focus, knowledge of products and services, and a desire for job advancement. These employees care about customers and believe strongly that their purpose is to provide outstanding customer service.

• *Customer-service culture*

Culture consists of the norms, values, assumptions, beliefs and expected behaviors of employees and the organization as a whole. What does the organization believe and value about customer service? How are these values manifested in hiring practices, in rewards and incentives, in cooperation among departments, and in how the organization is structured?

Organization structure reflects the culture. Values and beliefs influence how the company separates work functions and how it establishes roles and responsibilities and lines of communication. Are people in the marketing, sales, manufacturing and customer relations departments talking to each other, or is each department a silo of separation? Does the customer relations department know that the new CD players being delivered to stores have defective cords that will have to be replaced by the company?

Additionally, organization culture encompasses the incentive systems that motivate employees to work hard and pursue advancement opportunities within the company. Are employees recognized for fixing a problem for a customer? Are employees recognized for suggesting ways to improve products? Are employees who work best with customers the ones who are encouraged to seek advancement and are they being promoted?

• *Business processes*

This driver is about getting products and services to customers in a timely manner and in a condition that meets or exceeds expectations. Customer satisfaction and loyalty are a result of efficient and effective processes. For the most part, these processes should be invisible to customers. Sally doesn't care that the restaurant is short-staffed and employees are doing the best they can to fill orders quickly. She only cares that she will miss lunch because she doesn't have time to wait. The organization should have work processes in place that complete orders as customers expect and, when this is not possible, there should be a process for communicating with customers about the problem.

Effective business processes are supported by the resources employees need to deliver outstanding customer service. From in-store machines, to computers, to telecommunication technology, to simply a comfortable and efficient work environment, employees must have the resources to do their job right.

Tools for measuring TCE

Knowing the drivers for creating an outstanding customer experience is the first step. The second step is to measure each of these characteristics and track these measures over time. Choose the best measurement tool for the job. In most cases you should use more than one tool. This will help you assess the customer experience from different perspectives.

1. Mystery shopping

Trained auditors, acting as typical customers, evaluate the products and services of the business location. They record the location's performance on a predetermined set of indicators. These "customers," unknown to employees, experience a business as if they are regular customers. Mystery shopping done with competitors allows an organization to compare and learn from other companies.

2. Focus groups

Small groups of customers, employees or vendors are invited to come together to discuss customer service. This is highly structured and moderated by someone experienced in small-group facilitation. Participants are asked a set of questions to assess their attitudes, beliefs and perceptions of the company and its products and services. The focus group method is a way to hear what participants are thinking and give them an opportunity to share their concerns and suggestions. The method usually produces stories and descriptions of the nature of the customer experience. While this can be very useful, the findings are not generalizable to all customers.

3. Intercept studies

Customers are interviewed on-site, immediately after making a purchase or immediately after using the company's services. The experience is fresh in their minds. This method ensures that you hear from current customers and customers who are less self-selecting and biased than the typical respondents to surveys.

4. Customer satisfaction and loyalty survey

Customers are surveyed to assess their satisfaction with products and services and their loyalty to the company. They are asked to answer a list of questions that are mostly closed-ended, using rating scales. These surveys can include several open-ended questions, but they necessarily must be superficial. These surveys can be done through the mail, by telephone or on the Web.

5. Employee competency and engagement survey

Employees are surveyed to assess their ability to provide high-quality customer service and their sense of connection and commitment to doing so. This kind of survey can also be done through the mail, by telephone or on the Web. It can be done in a variety of settings: during a large meeting of employees, in teams, by departments, or one-on-one.

6. Customer-service culture survey

Employees are surveyed to assess their company's commitment to customer service and how well what management says is aligned with what management does. Employees are also asked about the availability of incentives and other kinds of support for providing high-quality customer service.

7. Company records

Departments, stores, service centers and other units of the company have data that can be used to track selected process efficiency and effectiveness indicators. For example, maintenance records from each store might have data to track equipment reliability. This data is analyzed to understand how company operations impact customer experience.

A total picture

Attracting and keeping customers depends on knowing what it is that makes the customer's experience a positive one. Using only one data collection method and choosing that method based on convenience will provide you with only a small piece of the total customer service picture. A complete picture includes measures of products and services, employee competency and engagement, organizational customer service culture, and business processes. These are the pieces that fit together to create a full understanding of the customer's experience. Without this total approach, you might discover some of the symptoms, but not the causes. Don't waste time under the streetlamp when you could be illuminating the road to outstanding customer service. IQ

Make it worth your while

By Brett Hagins

Work some process innovation research into your satisfaction study

Most customer satisfaction studies take respondents through a battery of predefined attributes and have them assess the performance of a company relative to its competitors. The studies also have some mechanism for gauging the importance of those attributes and their impact on overall satisfaction. Once the results are analyzed, company executives are presented with a "state of the union" report on where the organization is doing well and what can be improved.

What happens next?

At many of the organizations that do customer satisfaction research, nothing! But it doesn't have to be that way.

One approach to make more effective use of customer satisfaction research efforts is to get employees and management more invested in the act of doing research. And one way to do that is by hosting brainstorming sessions in all relevant process areas. The aim is to uncover any ideas the process leaders have for improving satisfaction in their respective areas. If the research shows that customers feel the process leaders' ideas would constitute an improvement, they may be more likely to take action.

Examples of the types of questions the employee groups may raise include:

- Could we have live support via instant messaging on the Web?
- Could we expand customer interest by loosening our payment schedule?
- Could we modify our pricing structure in a way that is revenue-neutral but customer-advantageous?
- Is there an important product extension opportunity that we are missing?

Common objections

Internal clients will have some common objections to testing process improvement ideas. For example, "The exercise will be a waste of time because customers will say they want everything!" This is why it is critical to structure process improvement questions so that the improvement is not only desired by the customer but of central importance in keeping or increasing their business with the company: "Which of the following would cause you to increase your business with Company X by at least 5 percent?" Or, "For which of the following would you be willing to pay a 10 percent price premium?"

Another common internal client belief is that the customer satisfaction study should be a diagnostic rather than a process improvement tool. ("We

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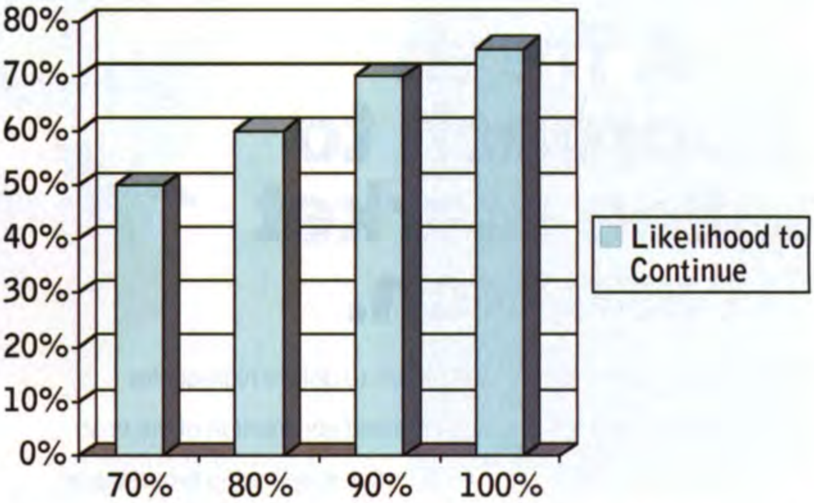
can always do more research after we highlight where the problem areas exist.") The problem with this thinking is that that subsequent research is rarely done. In reality, most companies are lucky if they can afford one customer satisfaction survey, much less multiple ones. This is why it is critical to embed at least some process improvement ideas in the core survey if you want to impact business results. It is much more common for a survey not to go deep enough and end up not driving action than it is for a survey to be too complicated.



Getting commitments

Again, it's much easier to drive process improvement if you get a commitment from the appropriate executives on the front end.

This involves several steps:

1. Develop an analytic plan that shows how the results will be used.

2. Get agreement from key process owners that they will own a particular measure.

3. Collaboratively determine with each process owner what an appropriate level of satisfaction is for their area (i.e., agree on a target number).

4. Find out their ideas - and the ideas of people beneath them - for improving the process if the target is not met (or even if it is).

5. Embed the most promising ideas in the survey and allow the customer to tell you what would be most beneficial.

6. Get a commitment in advance from the executives as to what level of customer support would be needed in order to implement Idea X.

7. Uncover any other barriers to implementation before the survey is executed and test those ideas that are both customer-centric and practical.

8. Design questions in the survey that anticipate and provide ammunition for overcoming internal barriers. "If Process X were implemented, would this allow you to increase your business with Company Y by 10 percent?" Alternatively, "Would you be willing to pay a small fee of $__ in exchange for Company Y implementing Process X?"

One of the ways to gain senior buy-in and sponsorship for a customer satisfaction study is to link it to an existing high-level mandate from executives. If improving customer retention by 10 percent is a mandate, the survey should be structured to help the organization do that.

Another way to elevate commitment is to link customer satisfaction scores with executive compensation or bonuses. This demonstrates in a concrete way that executives are making customers their No. 1 priority.

Tie it to revenue

It is essential to tie customer satisfaction numbers to revenue if you want senior executives to take notice. Typically, behavioral questions in the survey are most likely to be a leading indicator of future revenue from customers: How likely are you to continue to do business with Company X in the future?

Another critical task is to understand what ratings are good enough to have a positive impact on revenue. If 80 percent of your customers are rating your service as good rather than very good or excellent, this may spell trouble for your future market share.

One way to determine if the customer rating is high enough to positively impact revenue is to make a chart that plots overall satisfaction on the horizontal axis and the likelihood to continue to do business on the vertical axis.

The hypothetical example in the graph shows that when 100 percent of customers rate your customer service as excellent, almost 80 percent are likely to purchase additional products from you. Alternatively, when only 70 percent of your customers rate your service as excellent, then only 50 percent are likely to purchase additional products from you.

The threshold for how strong satisfaction must be in order to impact revenue will vary depending on the industry you are in and the switching costs associated with that industry. The level of satisfaction needed to ensure loyalty will be significantly higher in commodity industries due to the low switching costs than it would be for firms offering IT services consulting, for example.

How does one go about tying the customer feedback on process improvement ideas to revenue? One way is to understand what impact that particular process area has on overall satisfaction based on regression analysis. This first step will allow you to understand, hypothetically, that as customer service ratings go up by 50 percent, overall satisfaction goes up by 25 percent. You can then link the increase in overall satisfaction to the revenue graph discussed earlier.

If you've asked respondents what impact Process Improvement X will have on their likelihood to do business with you, or if they are "willing to pay a __ percent price premium" for it, it's important to remember that respondents will frequently overstate their intentions and so you need to "factor down" the customers' stated intentions to get closer to the actual impact. On a 5-point scale for example, this can be accomplished by taking 70 percent of the "definitely would," 25 percent of the "probably would," and 10 percent of the "might or might not" respondents. The percentages used to factor the level of customer interest will vary by category and can be continuously refined.

Disseminating throughout the organization

While giving in-person presentations is always desirable, there may be so many people who need to see the data that one does not have the time to give all the presentations necessary.

The following alternative means of communication should be used to supplement in-person presentations:

- One-page summary memos.
- PowerPoint presentations with accompanying voiceover narration distributed through your IT department to all employees.
- Sharing individual account data through an interactive, online customer satisfaction tool. Walker Research is one example of a customer satisfaction research firm that allows large client companies to distribute their customer satisfaction data real-time to a sales force or as many people as desired, using a tool called SmartLoyalty. Individual salespeople are able to log-on and see the results for their individual customers. This kind of a tool is critical. The days of the marketing research department hoarding data and presenting it on demand should come to a close. The danger of the raw data being misconstrued when there are many end-users are far outweighed by the danger (and likely reality) of the data not having sufficient visibility across the company.

If some version of the results is shared with all employees via a Web-based tool, consider giving employees a short test on the results at the conclusion. This will cause people to pay more attention to the presentation. Companies have used the Web-based testing approach for issues like IT security and sexual harassment; the same methodology would work with the results of customer research.

With regard to getting senior management to pay attention to the data in particular, the use of some guerrilla marketing techniques may be appropriate. You know where these people sit. You know where the executive elevators and washrooms are. Constructing posters with surprising statistics and putting them in opportune places (along with the source of the statistic and your name, title and phone number if they want more information) is one way of getting the attention of people you can't get in to see.

More willing to act

No matter how you do it, the key is to get people aware, interested and involved. Because when they've had a hand in the process behind the research, chances are they'll be much more willing to act on the results. | Q

continued from page 8

president of outdoor, Arbitron Inc. "Airport advertising can be an important complement to outdoor campaigns and should be part of the standard media mix. This is particularly true for advertisers of luxury goods."

In July 2003, a total of 2,005 people, age 12+, were chosen at random from a national sample of Arbitron's Spring 2003 survey diarykeepers and interviewed over the telephone. Additional studies, consisting of a national representative sample of 1,000 respondents of airline travel among adults 18+ were conducted in October 2003, January 2004 and March 2004 to allow for seasonal trending.

The research from this study also includes information from Scarborough Research. Based on consumer data from Scarborough Research, frequent flyers are two-and-a-half times more likely than the typical consumer to buy high-end jewelry and watches; two times more likely to buy or lease a luxury vehicle; and almost one-and-a-half times more likely to buy an MP3 player. For more information visit www.arbitron.com.

Unhappy auto buyers can be won back

A new study by Maritz Automotive Research Group, St. Louis, has found that auto buyers who complain about their vehicle quality or dealership experience and are happy with the way the dealership handles their complaints are more than 1.5 times as likely to be loyal to the dealership than non-complainers when purchasing their next vehicle.

The five-year tracking study, "Customer Complaints: An Opportunity to Increase or Decrease Customer Loyalty," is an analysis of 3,104 new vehicle buyers and lessees who responded to Maritz' 1998 New Vehicle Customer Survey and who were again surveyed in 2003. The Maritz study found that the majority of people who complained to their dealership about their vehicle or dealership experience were not satisfied with the way their complaint was resolved. However, when customers' complaints were resolved well, 60 percent returned to the dealership when replacing their vehicle. This compares to approximately 38 percent of non-complainers and only 30 percent of people who complained and were unsatisfied with the complaint resolution, returning to the dealership to purchase or lease a replacement vehicle.

When looking at repurchasing or leasing the same make/brand of vehicle (regardless of the dealership), a similar relationship between complaint resolution and loyalty was found. "The ability of the dealership to satisfactorily resolve customers' complaints represents a key moment of truth for the consumer and a large opportunity for dealers," says David Ensing, author of the study and director of Maritz Automotive Research Group. "Dealerships are the face of the auto manufacturer. Dealerships and vehicle manufacturers need to work together to quickly and painlessly handle legitimate customer complaints. It turns out that, if handled well, complainers can be the most loyal customers." The complete study is featured in Maritz Research's Research Report newsletter located at www.maritzresearch.com.

Product not made in the U.S.A? Shoppers don't care

A study reports that 72 percent of American shoppers don't check to see where products for the home are made before they buy them, and 57 percent report that even if they knew a product was not made in the U.S.A., it would have little or no effect on their decision.

The study was sponsored by Marketing Support, Inc., a Chicago brand marketing agency, and conducted by TeleNation, which polled 1,000 consumers in March 2004, with tabulations completed in late May. The margin of error was +/-2.6 percent.

The apathy toward purchasing U.S.-made products was even more dramatic among the youngest consumers, 18 to 24, only 15 percent of whom said that they would be more likely to purchase a product if they knew it was made in the U.S.

Among older consumers, ages 55 to 64, the results were almost opposite, with 44 percent stating that knowing the product was made in the U.S. would positively affect their buying decision.

Among those with a high-school diploma or less, 51 percent stated that they took the country of origin into account, but only 30 percent of those with post-graduate degrees stated they did so. The more education, apparently, the more apathy.

There was no variance by gender, income level or region of the country among the 72 percent who don't look to see where the product was made before purchasing.

According to David L. Weiner, CEO of Marketing Support, these results significantly differ from a Gallup poll undertaken in 1994, which reported that 84 percent of consumers moderately or strongly sought out American-made goods.

Weiner says there is no ongoing marketing campaign by private interest groups or the government that encourages consumers to look for and purchase American-made products. And there is no motivation reinforcement other than media reports, which primarily state the facts. In other words, nobody is telling people in U.S. households that buying American-made products is a good thing to do. "As a result, we appear to be part of a vicious circle," Weiner says. "We are losing hundreds of thousands of higher-paying manufacturing jobs to lower-paid service industry jobs, motivating consumers to look for products with the best price for the same quality, regardless of where the products are made. These consumers need to really stretch their dollars, and 'made in the U.S.A.' is obviously not the factor it once was.

"Manufacturers of commodity

products in particular are no longer capable of controlling their pricing. Their competitors set the pricing levels for them, including many of their own large retailer customers, who are establishing their own brands that are made offshore."

Weiner suggests that the Ad Council or the U.S. Department of Commerce, which has a $6 billion budget to develop a common "Made in USA" logo, encourage manufacturers of U.S.-made products to place it on their products and packaging, and then develop a campaign to motivate consumers to look for that logo when making a purchase. For more information visit www.msinet.com.

Consumers say supermarkets, food makers doing a good job

Supermarkets and packaged food companies top the list of industries which get the best marks for serving their customers, in the annual Harris Poll ranking 15 industries on how well they serve consumers. Fully 87 percent believe supermarkets do a good job of serving their consumers, and 77 percent feel this way about the packaged food companies. Next on the list come airlines (74 percent), computer hardware (73 percent), banks (73 percent), and software (72 percent) companies.

At the bottom of the list, only 30 percent think tobacco companies and managed care companies do a good job. Oil companies (32 percent) are only marginally better.

These are some of the results of The Harris Poll, a survey of 979 adults surveyed by telephone between April 8 and 15, 2004.

There have been two quite substantial changes between 2003 and 2004. Airlines, which fell very sharply in 2001, have bounced back, gaining 10 points from 64 percent last year to 74 percent this year. This is an increase of 23 percentage points since the airlines' lowest number, 51 percent in 2001.

Oil companies, on the other hand, have slipped 10 points this year from 42 percent in 2003, to 32 percent. This is a fall of 32 percentage points since their best number, 64 percent in 1998. It clearly reflects the impact of high fuel prices.

When it comes to long-term trends over the last seven years, since Harris first began asking this question in 1997, five industries have fallen by 19 percentage points or more. Pharmaceutical companies have fallen the furthest, down 35 points from 79 percent in 1997 to only 44 percent now. Oil companies have fallen 27 points since 1997, from 59 percent to 32 percent. Telephone companies are down 24 points from 80 percent to 56 percent. Managed care companies are down 21 points, from 51 percent to only 30 percent now. And health insurance companies are down 19 points, from 55 percent to 36 percent.

Concerns about prices are clearly the reasons for the decline in the ratings of oil companies and pharmaceutical companies. Health insurance and managed care companies declined sharply because they have had very bad press over the last several years, even though member satisfaction with health plans has not changed significantly over this period. The decline in the image of telephone companies mostly occurred when they were locked in telemarketing battles which probably turned off many people. Quality of service may also be an issue. For more information visit www.harrisinteractive.com.

San Francisco, are you ready to rock?

A study of consumers in local markets across the U.S. by Scarborough Research, New York, found that San Francisco is the top market for rock concert attendance. Nineteen percent of adult consumers there say they have attended a rock concert during the past year. Minneapolis (18 percent), Austin, Texas (18 percent), Milwaukee (17 percent) and Chicago (17 percent) round out the leading local markets for rock concert attendance. Nationally, 12 percent of adults have attended a rock concert during the past year.

Rock concert attendees lead active lives and are in high-income brackets. They are more than twice as likely as all consumers to have gone snow skiing, in-line skating, or to have played tennis during the past year. They are 49 percent more likely than all consumers to have gone swimming during the past year; 63 percent more likely to have bicycled; 67 percent more likely to have gone jogging; and 85 percent more likely to have participated in adult team sports. Twenty-one percent of rock concert attendees have an annual household income of $100,000+. They are 58 percent more likely than all adults to be in this income bracket. On average, rock concert attendees are 36 years old and they are 60 percent more likely than all adults to be single.

Rock concert attendees are avid consumers in top concert sponsorship categories, including automotive and beverage. This segment is 45 percent more likely than all consumers to have three or more cars in their household. They are 21 percent more likely than all consumers to have consumed bottled or canned tea during the past week and 43 percent more likely to have consumed a sports drink during the past seven days.

When it comes to radio formats, rock concert attendees are true to their interest and are 87 percent more likely than all consumers to tune in to rock radio stations. But their tastes go beyond the rock genre. An analysis shows that they are 32 percent more likely than all consumers to tune into adult contemporary; 39 percent more likely to tune in to contemporary hits radio; more than twice as likely as all consumers to listen to alternative format stations; 17 percent more likely to listen to oldies and 13 percent more likely to tune in to news/talk/information. The data for this report was compiled from Scarborough USA+ Release 2 2003. For more information visit www.scarborough.com.

Bricks-and-mortar bookstores still top choice

The scale of bookstore sales versus online sales of books still tips heavily in favor of bricks-and-mortar stores by an 8-to-1 ratio, or eight books sold in stores for every one book sold online. There is no denying that retailers face an increasing threat from online booksellers as the $17.6 billion book retailing market is shifting. In 2003, online sales of books represented 14 percent of total sales and amounted to $2.5 billion, up more than threefold from $800 million in 1998.

Research by Chicago-based Mintel reveals that nearly 40 percent of Americans purchase books at a bookstore in comparison to 14 percent who do so online. Male respondents are especially likely to favor bookstores.

There are several reasons why book buyers still visit bookstores, even as online booksellers enjoy greater reach and more widespread availability. The top two reasons are the desire for an in-store experience that includes a favorable atmosphere, and the opportunity for impulse purchases, both of which cannot be replicated by online booksellers.

Mintel's research reveals that consumers continue to shop at physical bookstore locations while also enjoying the convenience of online book shopping. In fact, approximately one-quarter of respondents indicate shopping both at bookstores and online sites. Effectively, one retail channel does not supplant the other. Instead, the two channels complement one another.

According to the recently published Mintel report on book retailing, there are an estimated 2,500 independently owned bookstores in the U.S., compared to an estimated 3,000 big chain bookstores such as Barnes & Noble, Borders and Books-a-Million. An estimated 27 percent of retail book sales are generated by big bookstore chains. Increasingly, book retailing in the U.S. extends beyond the big chain and independent bookstores. In 2003, for example, food stores, drug stores, mass merchants and warehouse clubs represent 53 percent of sales, up from 49 percent in 1998. Large bookstore chains are also growing. The big-box retailers reached $4.7 billion in book sales in 2003, and represent over one-quarter of all revenue in the book trade. Independent bookstores lost market share and suffered a 2 percent decline in revenue during the two-year period ending 2003. For more information visit www.mintel.com.

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audio (.wav) files. Customers may also provide their responses through their telephone keypad. Audio file storage and playback from within Enterprise 7 enables managers to hear verbatim comments in a customer's own words and tone of voice. All survey results can use CustomerSat's online analytics, dashboards, and Action Management along with feedback gathered through other channels. The product also allows companies to access results within CustomerSat from a CRM system, such as Salesforce.com or PeopleSoft, by clicking a link. For more information visit www.customersat.com.

Measure restaurant employee satisfaction with REES

St. Paul research firm Questar Data Systems has introduced the Restaurant Employee Engagement Survey (REES), a variation of Questar's current Employee Engagement Survey. REES uses 16 items to assess four dimensions that research has shown lead to a more engaged restaurant employee: task alignment, managerial strength, environmental health, and employee loyalty. REES is administered by telephone or paper. The program includes an administrative guide, a communications kit and optional telephone coaching for area managers.

A color-coded, one-page report gives restaurant managers a way to identify strengths and problem areas. The report also shows an overall engagement index for their unit, and identifies three key areas to focus on to improve engagement. Rollup reports show area managers the issues that need to be addressed to create more productive, engaged employees. For more information contact Anna Erickson at 651-683-8697 or aerickson@questarweb.com or visit www.questarweb.com.

SSI beefs up B2B samples

Survey Sampling International, Fairfield, Conn., has enhanced its business-to-business online samples, offering researchers access to more than one million businesspeople of all distinctions. Job titles include president, general manager, administrator, operations, and IT professionals. Users can select by a number of categories, including: number of employees and/or direct reports; annual revenue; functional role and/or occupation; business title/job title; industry segment; purchasing role; and number of personal computers. Among IT professionals, researchers can pinpoint more than 100 job titles, including individuals with skill sets and hardware and software experiences of many types. For more information visit www.surveysampling.com.

SPSS offers text analysis product, update of Dimensions

Chicago-based SPSS Inc. is now offering SPSS Text Analysis for Surveys, a new software product designed to help researchers turn unstructured, qualitative data into structured, quantitative data by extracting and classifying key concepts from open-ended survey responses. Using the product's linguistic algorithms, researchers can unlock open-ended data. Categorized text responses can be quantitatively evaluated alongside other data. Those responses can be further refined through manual techniques.

Researchers will also save time by simplifying in-house creation of code lists and eliminating the need to read verbatim responses word for word. The categories or "codes" produced can be re-used to provide consistent results across the same or similar studies.

Data can be imported from multiple sources, including ODBC-compliant databases, Microsoft Excel files (.xls), and SPSS files (.sav). The product can work in conjunction with the SPSS statistical and data management family of products and the Dimensions market research technology platform. Once created, categories can be exported for further analysis in applications such as SPSS for Windows and Excel.

SPSS is also now offering a new version of SPSS Dimensions, an application suite for survey design, data collection, data management, analysis and publishing of survey research results. This latest release includes updates and enhancements to mrInterview, which provides survey researchers with an end-to-end solution for fielding and managing Web research projects; mrStudio, which enables customers to manage survey research data using efficient scripting; and mrTables, which helps users build, share and interact with tables using a Web browser. For more information visit www.spss.com.

Raosoft updates EZSurvey, adds SMS capability

Seattle research software firm Raosoft, Inc. has issued Service Release 1 of its EZSurvey 2004 software. It adds new security features and form design enhancements, including: a new Active Preview window, which displays the form page as you type; hard-coding of SQL commands into an XML file on the Web server to make them invulnerable to nonsense-data attacks; a form processor that detects buffer overrun attacks and improper file names and sends an e-mail notification to the Web site owner; improved e-mail importing and management; and new algorithms designed to allow faster import and export of large data files.

Separately, through a partnership with Mobile Feedback, Ltd., Raosoft has added text messaging (SMS - short message service) to EZSurvey 2004. Customers can now conduct interactive data gathering, feedback and polling, with immediate reports of results. EZSurvey SMS broadcasts text messages and collates responses, combining the characteristics of mobile phones and e-mail. Other features: multiple messages can be collated into a single database for real-time reports; automatic responses to incoming messages are possible (e.g., to deliver winners' confirmation messages); faster response exists due to load balancing and a scalable architecture safely supports high message vol-

ume; and cost is low through sharing an SMS gateway among several end users. For more information visit www.raosoft.com.

Personicx adds tracking of life changes

Acxiom Corporation, Little Rock, Ark., is now offering Personicx LifeChanges, a consumer segmentation system designed to allow marketers to target receptive customers as they move through life variations that affect their purchase behavior. Personicx is a household-level segmentation system that places each U.S. household into one of 70 segments, or clusters, based on its specific consumer behavior and demographic characteristics. Personicx LifeChanges tracks the migration of households from one Personicx life stage cluster to another by using Acxiom's InfoBase List prospect file, which is composed of households whose segment assignment has recently changed from one Personicx life stage to another. Personicx LifeChanges creates a monthly "change" file compiled from an evaluation of changed Personicx codes on the InfoBase List file and historical trend analysis.

Some specific events such as marriage, the purchase of a home, the birth of a child or preparation for retirement are likely to result in a cluster change. According to research conducted by Acxiom, an estimated 30 million to 35 million household Personicx cluster migrations occur each year. Personicx cluster assignments are updated each month to reflect the constant amount of consumer change. For more information visit www.acxiom.com.

It's confirmed: Confirmit 8.5 now available

Oslo-based Future Information Research Management has released a new version its Confirmit online survey and reporting software. Confirmit 8.5 is designed to provide companies with a variety of reporting capabilities for surveys such as ESAT (employee satisfaction) and organizational climate.

It includes new report automation and personalization functionality for companies to create and deliver reports that let each manager see the results for his/her own unit, compared to other relevant units within the business.

The new report automation and personalization functionality is available in Confirmit's Web-centric reporting platform, Reportal. Businesses can choose to provide their managers with secure online access to Reportal, enabling them to drill down, or alternatively deliver static personalized reports in MS PowerPoint or MS Excel directly to their inboxes. For more information visit www.confirmit.com.

New suite of segmentation tools

VisionEdge Marketing, an Austin, Texas-based marketing consulting firm, has launched a beta version of its Envisage Tools Suite, which offers users three separate tools to aid in positioning and segmentation efforts. The Suite currently consists of Envisage Advantage, Envisage Target, and the Envisage Opportunity Calculator. The tools help users see a potential market from several angles. Each tool is based on strategic questions for which users provide input. For more information visit www.visionedgemarketing.com.

Regulus study tracks kids' reactions to research

Regulus Communications, Inc., a Lincoln, Neb., research company, has established The Research Monitor project to track kids' research participation and preferences. The study is conducted through the Young Author's Magazine Anthologies program. Regulus asks young authors and their parents to respond to basic questions about Internet research participation, survey methodologies and Internet privacy issues. The study tracks nine research techniques, from Internet panels to mystery shopping; the most important Internet privacy issues for kids and parents; and the potential for legal actions by parents against intrusive sponsors of market research.

The purpose of The Research Monitor is to serve as a strategic assessment guide for selecting market research services and methodologies for researching with kids online, and to keep research sponsors, marketing directors, brand managers, consumer groups, market researchers and parents informed about potentially intrusive market research methodologies.

The report from the study will be published quarterly beginning this month and will help guide research sponsors in selecting the best methodologies to use when researching with kids online, and help them avoid becoming the legal target of angry parents. For more information contact Richard Austin at 402-450-1252 or visit www.regulus.com.

Conjoint module from QuestionPro

Seattle-based QuestionPro Inc. has released its conjoint analysis module for measuring product profiles and customer intentions. The QuestionPro Conjoint Analysis Simulator helps market researchers extract numeric values for the different attributes of a particular product in a manner that is intrinsic to the consumer. Consumers are presented with different profiles and are asked to choose and rate the different profiles. Different models are used to calculate the relative importance of the different attributes that make up a product. This data can further be used to determine market share of products and how new product introductions may realign the market share. For more information visit www.questionpro.com/conjoint.

Wearable device measures media exposure

Germany-based GfK is now offering MediaWatch, a wristwatch-like device for electronic media reach research. It measures whatever mass media the wearer comes into contact with, wherever the wearer may be. MediaWatch is a further development of the Radiocontrol audiometer

developed by GfK subsidiary Telecontrol in Switzerland, which electronically measures radio audiences. Like its predecessor, the new metering unit is designed in the form of a wristwatch, and it is equally able to measure the media contact of the wearer with radio, TV, newspapers, magazines and other printed matter as well as cinema and outdoor advertising.

A recording unit records and encodes audio and radio signals three times a minute. The MediaWatch is able to record data for up to four weeks before it has to be changed. If clients wish, they can have docking stations installed for panel members which can be used to send the signals recorded during the day to the GfK IT centers overnight. These are compared with sample signals from programs. For more information visit www.gfk.com.

Add streaming video to online surveys

StreamingSurvey.com is a new product from Chicago-based Survey Writer.com that incorporates streaming video playback into its online survey tool. StreamingSurvey.com combines all of the functionality of SurveyWriter.com with the ability to embed video with guaranteed playback into surveys. By using a playerless video system, StreamingSurvey.com is designed to make the experience of taking a survey with video embedded into it easy and efficient. This new online survey tool allows companies to test video advertising, animatics, infomercial concepts, movie trailers or any product or service with a video component. The player is Java-based so that video will play on all Java-compatible platforms and browsers. The encoder can take media in any format and turn it into streaming video. In addition the media is encrypted. For more information visit www.surveywriter.com.

Ipsos firms debut pricing strategy suite

New York researchers Ipsos-Insight and Ipsos-Vantis are now offering a full-service pricing strategy suite called Price Evolution that addresses manufacturers' and marketers' pricing challenges at various stages in a product or service life cycle. The Price Evolution frameworks consist of four stages of customized pricing solutions to meet a range of pricing challenges: Price Test, for early in the development process; Price Optimization, typically employed after a product or service has passed through the initial concept testing stage; Price Estimator, used pre-launch; and Market Simulator, for a mature product or service.

The suite combines market research capabilities with a validated forecasting model to adjust consumer-stated survey data to reflect actual behavior. Clients can test the impact of variable pricing and marketing strategies - such as different price and feature combinations, or lowering the price to meet price-aggressive channel requirements - on sales. For more information visit www.ipsos-insight.com.

New facilities

Promark Research Corporation, Houston, has opened a call center in Rexburg, Idaho with 45 CATI stations that are expandable to 75 stations. Rexburg is home to Brigham Young University Idaho, which is expected to provide many of the center's telephone researchers and supervisory personnel.

Promark also announced that it has installed Voxco's Pronto predictive dialer at its Houston data collection call center facility. For more information visit www.promarkresearch.com.

Ventura, Calif.-based Reyes Research has opened a new Los Angeles-area facility in Sylmar, in the northeast section of the San Fernando Valley. Heading up the office is Jennifer Torres Rayas, previously manager of the firm's Oxnard/Ventura office. Phone 818-367-4445.

Briefly

Synovate India has set up CATI centers in the cities of Delhi, Mumbai, Bangalore and Chennai. For more information visit www.synovate.com.

New York-based P\S\L Research Group has formed Medefield America to provide pharmaceutical research field services. For more information contact Elys Roberts at 212-220-0880 or at elys.roberts@medefield.com.

New York marketing firm Cohn & Wolfe has launched its proprietary research and brand planning process, MindworX. A set of intelligence tools, MindworX is designed to leverage consumer communications styles to build stronger brand differentiation in the marketplace. For more information visit www.cohnwolfe.com.

AcuPOLL Research, Cincinnati, has introduced eFactor, a new method for assessing the initial and deeper emotional connection made by advertising. It uses the studies of social psychologist Robert Plutchik as its foundation for gathering unarticulated emotional responses in an effort to unearth brands that can win over consumers. For more information visit www.acupoll.com.

Colwell & Salmon Communications, Inc., Albany, N.Y., has expanded its offshore data collection capabilities at its facility located in Noida, India, just outside of Delhi. The new facility has added approximately 200 seats to the current 125 U.S.-based seats. For more information visit www.colwell-salmon.com.

Menlo Park, Calif.-based Knowledge Networks is now offering KNOW, a new business and market research magazine. It can be accessed at http://know.knowledgenetworks.com. For more information contact David Stanton 908-497-8040 or at dstanton@knowledgenetworks.com.

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Arbitron field representatives and reductions in some of the incentives."

The two companies' collaborative Philadelphia tests involved testing two similar methodologies, each in a panel of 100 households. The first panel tested the use of membership representatives to recruit all panelists. The second panel tested a hybrid methodology that uses both representative and phone-based recruiting. Interim results from the first 12 months of the test indicated sample performance indicators of 33.3 and 33.8 for the first and second panels respectively.

Nielsen will closely monitor results from Arbitron's use of the modified version of this new hybrid methodology in Houston. "Those results will be an important part of our overall analysis of the PPM," says Jack Oken, general manager of Nielsen's local business unit, "along with the results of other tests, overall financials, engineering due diligence, and market acceptance of the potential change in the currency."

The two companies are exploring the feasibility of using the PPM as a data collection tool for a common panel used for both television and radio audience measurement. Arbitron and Nielsen first announced an agreement in June 2000 to explore the possibility of a joint venture to deploy PPM for local market measurement of television and radio in the United States.

The American Floral Endowment announced that New York-based **Ipsos-Insight** will manage the long-running Ipsos AFE Consumer Tracking Study. "Ipsos developed the Ipsos AFE Consumer Tracking Study for us in 1992," says Steve Martinez, executive vice president of the American Floral Endowment. "For over 10 years, it is has been the only ongoing source for floral consumer purchase data, assisting business owners in making informed business decisions."

"We are thrilled to have the Endowment's support as we continue to broaden our work within the floriculture industry," says Barrie Rappaport, chief analyst and manager of the project for Ipsos-Insight. "Our initial goal is to increase awareness of the study and to make it accessible to everyone from breeders and growers to wholesalers and retailers."

Menlo Park, Calif.-based **Knowledge Networks** has raised $9 million in new financing from its long-term backers. The financing included Oak Investment Partners, Alloy Ventures, Maveron and Oak Hill Venture Partners.

Acquisitions

Millward Brown has acquired Boston-based strategic marketing research and consulting firm **Marketing and Planning Systems**, better known as MaPS. John White will remain CEO of MaPS, which will now be known as MaPS - A Millward Brown Company.

IMS Health, Fairfield, Conn., has signed an agreement to acquire **United Research China Shanghai**, a company that covers China's over-the-counter market and offers consumer health consulting services. The acquisition is subject to government approval. The financial terms of the agreement were not disclosed.

After acquiring a 51 percent shareholding in 2001, Germany-based **GfK Group** has increased its shareholding in the U.K.-based **GfK Martin Hamblin Group**, retroactive from January 1, 2004, making it a wholly-owned subsidiary. As group managing director, Kjell de Orr takes over responsibility.

In a separate move, retroactive to July 1, 2004, GfK has also acquired a 95 percent stake in the Brazilian company Indicator GfK and established a new company in Chile.

Greenfield Online, Inc., Wilton, Conn., has signed a definitive agreement to acquire all of OpinionSurveys.com's online panel members from **The Dohring Company,** a Glendale, Calif., research firm. When completed, the acquisition is expected to add approximately 1.1 million households to the Greenfield Online panel. The all-cash transaction, which at press time was expected to close this month, is subject to certain closing conditions. Under the terms of the definitive agreement, Greenfield Online will acquire specific assets from The Dohring Company, including the complete OpinionSurveys.com panel, certain profile information contained in its database; title to the domain names OpinionSurveys.com and OpinionSurvey.com; as well as certain intellectual property and goodwill associated with the OpinionSurveys.com panel. Under the terms of the agreement, Greenfield Online will not assume any liabilities from The Dohring Company.

Paris-based **Ipsos** has acquired **Hispania Research Corporation**, a company based in Puerto Rico and Panama. Hispania Research Corporation, which generated $3.5 million in revenue during the last fiscal year, accounts for 12 percent of the market research industry in Puerto Rico. The company employs 25 full-time staff and also has a subsidiary in Panama.

Synovate has acquired **Proactive Insight**, a South African research firm.

ComScore Networks, Reston, Va., has acquired research firm **Q2 Brand Intelligence**. As part of this acquisition, the Q2 organization will be integrated into comScore's established survey research division, and the combined business unit will operate as a division of comScore Networks under the name comScoreQ2. Larry Denaro, founder and CEO of Q2 Brand Intelligence, has assumed the position of president, comScoreQ2. All Q2 executives and research professionals will join the comScore team, and comScore will continue to operate Q2's offices in Seattle and Boston.

Alliances/strategic partnerships

The AGB Group and **Nielsen Media Research International** have announced a joint venture that will offer television ratings in 30 countries. AGB Group is part of Kantar Media Research, a division of the Millward Brown Group. Its TV audience measurement services will merge with those wholly owned by Nielsen Media Research International. The deal does not include Nielsen's U.S. TV ratings service. The new enterprise will be a 50/50 joint venture between Nielsen Media Research parent VNU and Kantar. The new company will be known as AGB Nielsen Media Research and will cover major markets including Australia, China, Hong Kong, Italy, South Africa and the U.K.

The new entity will headquarter its day-to-day operations in Milan, Italy, (the current headquarters of AGB); its board will be based in the Netherlands. AGB Nielsen Media Research will employ approximately 1,800 professionals and will have revenues of approximately $110 million based on 2003 financials. The board of directors of the new company will contain equal representation from VNU and Kantar. The joint venture will be led by AGB's current management, Alberto Colussi and Rolando Stalli.

Seattle research firm **NetReflector, Inc.** and Cincinnati-based **Language Logic** have announced a strategic alliance under which NetReflector will integrate Language Logic's Ascribe verbatim-coding technology into its online survey application InstantSurvey to enhance the recognition and analysis of open-text responses.

LatiNetwork Dichter & Neira of Panama is now a member of the **Harris Interactive Global Network** of independent research companies. The firm specializes in employee satisfaction research, ad-hoc studies and multi-country studies. With operations throughout Central America, LatiNetwork Dichter & Neira has sustained an annual growth of 20 percent over the last five years. The staff consists of 23 market research practitioners and 140 interviewers.

Also joining the network is **MarketShare**, a full-service market research company in Singapore.

Indianapolis-based **Walker Information** has added two firms to its global network: **SKA Division of Mediafax**, based in Puerto Rico, and **Celsius Research** - Japan.

Association/organization news

The Southwest Chapter of the Marketing Research Association has awarded four scholarships for 2004. The Scholarship Program was developed to encourage and assist educational pursuits among those employed in the marketing research industry. Members of the chapter and/or their employees are eligible to apply for monetary awards each year that the program is approved by the chapter board. The four 2004 recipients are: Richard Cram, Information Alliance, $750; Steve Larson, Information Alliance, $750; Carmen Muniz, Galloway Research, $525; Chism Nash, Information Alliance, $720.

The U.K.-based **Association for Qualitative Research** has announced Bryan Urbick, director of research, CKC/KidsLink Research Limited, as this year's winner of the Prosper Riley-Smith Effectiveness Award. Urbick shared the award with Sarah McDonald and Carolina Polo of Kellogg's, Battle Creek, Mich.

Urbick received the award on behalf of the three for the innovative approach to researching Kellogg's Froot Loops cereal brand. In response to a brief to determine why sales of the Froot Loops brand were declining, Urbick devised a methodology to assess children's emotional response to the brand. The market research team at Kellogg's was integral in approving the new methodology, and the brand management team applied the learnings.

The research project combined the use of story completion with in-depth "creative" interviews to encourage children aged between six and 10 years old to identify their feelings about the brand. The results led to the development of a new style of communication with children that has halted the brand's declining market share and seen a considerable turnaround in sales.

Jessica Mazzola, Director of Research for the **Key West Chamber of Commerce**, was selected as the winner of the first-ever Betsy Jane Peterson-Marketing Research Association Award.

The award was established by the **Marketing Research Association** with the University of Georgia Foundation in November 2003 to honor Betsy Peterson for her leadership and contribution to the marketing research industry upon her retirement after 13 years as executive director of the MRA.

This fund provides an award to one or more candidates who are pursuing an education in marketing research through Marketing Research Institute International's (MRII) and the University of Georgia Center for Continuing Education's Principles of Marketing Research Program, or a Master's of Marketing Research in the Terry College of Business at the University of Georgia.

The selection committee was presented with 14 applications to review and select their top three candidates. Mazzola's application stood out as representing someone who has proven to be an outstanding and dedicated researcher in the profession. A devotee of continuous learning, Mazzola plans to improve the research methodologies of her organization to better assist the Key West business community. She wants to positively impact the community by giving accurate and timely market analysis to help Chamber members profitably run their businesses.

Awards/rankings

New York-based **Ipsos** reports that it has been cited as the fastest-growing market research firm in the U.S., according to the 12th annual industry rankings report by the newsletter *Inside Research.* The company's U.S. revenues grew by 477 percent between 1998 and 2003, compared with the industry average of 50.6 percent, the newsletter reported.

Toronto-based **Delvinia Interactive Inc.** announced it was awarded one of five excellence in research awards at this year's annual Professional Marketing Research Society conference. Delvinia was recognized for AskingMedia, its online ad-testing application, which was used on two research projects Millward Brown conducted for Nissan Canada and Expedia.ca. The Excellence Behind the Scenes award is given annually to companies whose efforts in areas such as data collection, panel recruiting, data processing and analysis enable the completion of market research projects.

Australian market research firm **Market Equity** received two awards at the 2004 Telstra Small Business of the Year awards. Market Equity won the AMP Business Award for businesses with between 50 and 100 employees and the Telstra WA Small Business of the Year Award. The Telstra and Australian Governments' Small Business Awards are designed to showcase the success of Australia's best small businesses and to promote their achievements to the wider community. It is the first time a research company has won this award.

Flake-Wilkerson Market Insights, Little Rock, Ark., announced that it has been recognized as the 35th largest research firm in the U.S. according to The Honomichl Top 50. The firm reported 2003 U.S.-only revenues of $17.8 million, up 27.1 percent over 2002. The firm advanced from the 41st spot in 2002 to 35th in 2003.

Braintree, Mass.-based research firm **Perseus Development Corporation** has been named to Deloitte's Technology Fast 50 Program for New England, a ranking of the 50 fastest-growing technology companies in the area by Deloitte & Touche LLP.

New accounts/projects

Nashville-based **20/20 Research, Inc.** has added **Kraft Foods** and **Campbell Hausfeld** to its list of online software subscribers. Kraft obtained a 20/20 Research Online software subscription for a second division of the company based on satisfaction with a first subscription. Kraft currently uses the 20/20 Research software in its consumer research divisions, and will soon utilize the Qualboard online bulletin board functionality to conduct internal discussions with its offices around the world. Power-equipment maker Campbell Hausfeld added the online software to its research tool box to further its consumer research efforts.

Separately, 20/20 Research announced it has added market research firms **B/R/S Group** and **Leiberman Research Worldwide** to its list of online software subscribers. B/R/S Group added the Qualboard software as another tool for conducting research for its clients. Lieberman Research Worldwide will also use the software for conducting client-sponsored qualitative research projects.

Arbitron Inc., New York, has reached an agreement with Infinity Broadcasting Corporation for a multiyear contract including radio ratings and other related services for its 185 stations. The agreement gives Infinity Broadcasting access to Arbitron quarterly radio ratings in 42 markets including the Spring 2004 survey.

Separately, Arbitron Inc. has signed an agreement with **eMediaTRADE** for access to eMedia's Media eXchange Desk technology and services. Arbitron plans to use the eMediaTRADE technology to assist in making future versions of Arbitron's media planning and buying software and Arbitron radio sales software compatible with the American Association of Advertising Agencies standards for the exchange of transaction data between advertising agencies and media outlets.

Hoffman Estates, Ill., research firm **FreshLook Marketing Group** has been tapped by **Marine Harvest**, a Pompano Beach, Fla., aquaculture company, to provide distribution, sales and pricing data on fresh seafood.

Chicago-based research firm **Synovate** has selected **SPSS Inc.**, also of Chicago, as a worldwide preferred supplier of market research technologies. The global agreement names Dimensions from SPSS, an integrated market research platform for survey design, data collection, data management, analysis and publishing of market research results, as Synovate's technology of choice throughout its worldwide operations. Synovate will promote the use of Dimensions for data collection, data cleaning and manipulation, data analysis and reporting to its locations around the world. The Synovate/SPSS global agreement expands a 2002 agreement between the companies that standardizes the use of Dimensions for Web-based data collection in U.S. Synovate locations.

New companies/new divisions/relocations/expansions

Al Barraza has formed **Barraza & Associates**, a consulting and research firm. Barraza was a senior marketing research manager with Allstate Insurance. Several of his colleagues, with skills in quantitative and qualitative research, have joined the firm as senior consultants. For more information call 650-458-8925 or visit www.barraza-associates.com.

Research software firm **E-Tabs** has opened an office in New York and tapped Aaron Benedict to head it.

Millward Brown's Russian licensee **A/R/M/I-Marketing Millward Brown** has opened an office in Kiev, Ukraine. The office, which will be managed by Svetlana Pototskaya, is

located at Office #31, 1-3 Frunze Street, Kiev 04070, Ukraine. Phone 380-44-531-4326.

Jay Wilson, ex-chairman and CEO of Roper Starch Worldwide, and Simon Chadwick, until recently worldwide CEO of NOP World, have formed a new management consulting company, **Cambiar LLC**. Cambiar will be based in Fairfield, Conn., and Phoenix. Phone 203-254 7221 (Wilson) or 602-387-5109 (Chadwick).

U.K.-based data-handling firm **ATP** has changed its name to **Cobalt Sky** and opened an office in New York. The New York office will initially offer data processing services. As part of the renaming the firm has changed its e-mail address and Web site to use the domain cobalt-sky.com, though mail addressed to atp.co.uk will still be routed to the correct people.

Braintree, Mass., research company **Perseus Development Corporation** has opened a new office in the U.K. Located near London, Valloria Software (Perseus UK) provides sales, strategic product support, training and implementation support to Perseus' customers and prospects. Peter Barnett has been appointed as the managing director of the company.

In a joint venture with U.K.-based ag marketing firm **Precision Prospecting**, German ag research firm **Kleffmann** has created a new company called **KactiveResearch**, with will be headquartered in the U.K. and led by Chris Horne and Mike Heisig.

Suwanee, Ga.-based research firm **CyberAnalysis LLC** has changed its name to **Eidex Group LLC**.

Company earnings reports

For the first six months of 2004, Netherlands-based **VNU** reported 8 percent organic revenue growth in its Marketing Information unit (which includes ACNielsen) and 7 percent in its Media Measurement & Information unit (which includes Nielsen Media Research).

Germany-based **GfK Group** closed the first six months of 2004 with improved figures compared to the previous year. Sales were up by almost 14 percent to EUR 320.6 million, with EBIT after income from participations of EUR 35.5 million rising at a rate of 19.1 percent. The margin, EBIT after income from participations in relation to sales, increased to 11.1 percent (previous year: 10.6 percent) in the first half-year. Consolidated total income rose by almost 37 percent to EUR 21.2 million.

Based on this performance, GfK increased its forecast for the year to a new sales target of EUR 660 million, an increase of EUR 10 million on the previous target figure. EBIT after income from participations is set to increase to over EUR 82 million (previously EUR 78 million), which equates to a margin of approx. 12.5 percent.

For the second quarter ended June 30, 2004, **Arbitron Inc.**, New York, reported revenue of $65.1 million, an increase of 5.9 percent over revenue of $61.4 million during the second quarter of 2003. Costs and expenses for the second quarter increased by 8.8 percent, from $48.8 million in 2003 to $53.1 million in 2004. EBIT for the quarter were $15.9 million, compared with EBIT of $16.1 million during the comparable period last year.

Interest expense for the second quarter declined 39.3 percent, from $3.2 million in 2003 to $1.9 million in 2004, due to reductions in debt between the two periods.

Net income for the quarter was $8.6 million, compared with $8.0 million for the second quarter of 2003. Net income per share for the second quarter 2004 increased to $0.27 (diluted), compared with $0.26 (diluted) during the comparable period last year. In the second quarter 2004, Arbitron reduced its long-term debt by $10.0 million to $75.0 million.

For the six months ended June 30, 2004, revenue was $141.7 million, an increase of 6.7 percent over the same period last year. EBIT was $47.8 million, compared to $46.0 million in 2003. Net income for the six months was $26.7 million or $0.85 per share (diluted), compared with $24.1 million or $0.80 per share (diluted) during the comparable period last year.

Paris-based **Ipsos** reported consolidated revenues of 286.0 million euros for the first half of 2004, an 8.2 percent increase over the same period in 2003. Organic growth came in at 8.6 percent. Newly integrated companies accounted for 3.9 percent of revenue growth. Currency effects remained substantial, albeit less so than in the year-earlier period. They dragged down revenues by 4.2 percent in the first half, and resulted mainly from adverse movements in the U.S. dollar, the Canadian dollar and the Mexican peso against the euro.

IMS Health, Fairfield, Conn., announced second-quarter 2004 revenues of $379.6 million, up 12 percent (9 percent on a constant-dollar basis) compared with revenues of $337.8 million for the second quarter of 2003. SEC-reported diluted earnings per share in the 2004 second quarter was $0.27, an increase of 17 percent compared with $0.23 in the prior-year period. Adjusted diluted earnings per share for the second quarter of 2004 were $0.29, up 16 percent compared with $0.25 in the 2003 second quarter. Net income for the second quarter of 2004 was $65.1 million on an SEC-reported basis and $69.5 million on an adjusted basis, compared with net income of $55.4 million on an SEC-reported basis and $60.4 million on an adjusted basis in the year-earlier quarter, up 15 percent on an adjusted basis. The company's operating income was $102.5 million in the 2004 second quarter, up 5 percent (3 percent constant dollar) from $97.3 million for the year-ago period.

Names of Note

continued from page 10

London-based *Martin Hamblin GfK* has named **Christopher Monos** global head of Martin Hamblin GfK's Gamma team, the firm's analytics, modeling and forecasting division. **Beverley Henry**, previously based in the U.K., will relocate to the U.S. office to support Monos in the development of the team. Separately, the firm has appointed **Alastair Bruce**, current general manager of Martin Hamblin GfK Inc. (the U.S.-based HealthCare Division), to the main board of Martin Hamblin GfK.

Arbitron, Inc., New York, has named **Joan E. Gerberding** vice president of sales for Arbitron Outdoor.

ICR/International Communications Research, Media, Pa., has named **Michael Brenner** vice president, client strategies.

Chicago qualitative research firm *Wooldridge Associates* has named **Shaili Bhatt** research associate.

Bob Chua has been named managing director of sales, international, at Seattle-based *Global Market Insite*.

Jonathan Rea has been appointed CEO of *Research International* in Italy. He succeeds **Ivana Ventura**, who becomes global managing director of Research International Qualitatif. Elsewhere, **Hamish Munro** has moved from the position of CEO Taiwan to CEO Hong Kong and regional business development director. **David Shum** is the new CEO, Research International Taiwan. **Marc-Antoine Jacoud** has become CEO of Southern Europe with management responsibility for the Greek, Italian and Spanish businesses. And Research International has appointed **Sarah Phillips** to the newly created post of European healthcare director.

The Kantar Media Research Group has named **Richard Asquith** managing director of BMRB, an operating company within the KMR Group. He will be supported locally by **Sue Brooker**, who will manage the social and stakeholder research units, with **Richard Poustie** taking on responsibility for management of TGI in the U.K. and Western Europe.

New York-based *TNS Media Intelligence/CMR* has named **Maurice Moore** vice president, sales of the Midwest region. He is based in the company's Chicago office.

Portland, Ore.-based research firm *Doxus* has named **Jean Malarkey** senior researcher.

David Reiss has joined *Lightspeed Research*, Basking Ridge, N.J., as vice president of business development.

Yuji Hirahara has been named president of *Millward Brown* in Japan. In addition, **Shishir Varma** has been appointed joint managing director of Millward Brown Japan. Elsewhere, **Nile Rowan** has been named senior vice president of the U.S. Western Region, North America. **Rajeev John**

has joined Millward Brown as an account director in Sydney. **Grace Chua** has been named human resources director for the Asia-Pacific region. At Millward Brown UK **Mary Biggs** has been named brand manager for AdSelector. At Millward Brown North America the following promotions were announced: **Michael Bellhouse** to vice president, Fairfield, Conn., office; **Howard Silverman** to vice president, Atlanta; **Curtis Frazier** to vice president, marketing sciences, Austin, Texas. **James Conrad** to vice president, Toronto.

Scott Koenig has joined *MI3 Market Intelligence* Services, Englewood, Colo., as a senior analyst. He will be based in the Dallas office.

Directions Research Inc., Cincinnati, has promoted **Tim Laake** to senior project manager, **Debbie Long** to assistant controller and **Michelle Weisman** to production services specialist. The company has also hired **Tish Grote** and **Erin Wittes** as research analysts, **Amy Dresser** as a senior account executive and **Hannah Barnett** as a research assistant.

Vancouver, B.C.-based research firm *Vision Critical* has named **Michael Rodenburgh** senior vice president, client services.

ComScore Networks, Reston, Va., has named **Leslie Darling** vice president, comScore Media Metrix, based in comScore's New York office. In addition, **Lynne Gillis** has been named vice president, comScore Survey Research, in comScore's Chicago office. Also in the Chicago office, **Pamela McHugh** has been named vice president, comScore Survey Research, and **Alistair Sutcliffe** has been named vice president.

WebSurveyor, Herndon, Va., has named **Janet Driscoll Miller** director of Internet marketing and **Kelly Waffle** director of marketing programs.

Waltham, Mass., research firm *Affinnova, Inc.* has named **Michael Cassettari** vice president of marketing.

Netherlands-based *VNU* has announced that **Frank Martell**, COO of VNU unit ACNielsen, will take on additional responsibility for ACNielsen Europe as president and CEO of that regional business. He will continue to report to **Steve Schmidt**, president and CEO of ACNielsen. With Martell focusing more of his time on the European business, Schmidt will assume from Martell direct accountability for ACNielsen's Latin America and Asia Pacific regions, along with its global finance function and Project Atlas, a business improvement program. Martell will retain accountability for ACNielsen's Emerging Markets region, global customized research, and global operations and information technology. He will relocate from New York to ACNielsen's European headquarters in Wavre, Belgium.
Separately, VNU announced that **Steve Wilson** has been appointed president and CEO of VNU Advisory Services, succeeding **Brian Chadbourne**, who has elected to take early retirement. In his new role, Wilson will be directly accountable for the performance of BASES, Spectra, Claritas and HCI - the four units that are part of VNU Advisory Services. In addition, **Joe Willke**, president of BASES, will take on an expanded role overseeing the development and implementation of a strategic framework for VNU Advisory Services.

Terri Jo Kumar has been promoted to production supervisor for the three southern California locations of Ventura, Calif.-based *Reyes Research*.

G & S Research, Carmel, Ind., has promoted **Melinda Spaulding** to vice president, analytics. In addition, **Erin Horner** has been named senior project manager for research programs and **Anne Chapman** has been named associate vice president.

Spaulding

Cincinnati-based *Marketing Research Services Inc.* has added five employees: **Jeff Eha** has been named account manager; **Martha Myers** project director; **Rafael Ortiz** Hispanic project director; **Kathie Smith** tab programmer; and **James Fischer** scriptwriter.

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Listed below are names of companies specializing in qualitative research moderating. Included are contact personnel, addresses and phone numbers. Companies are listed alphabetically and are also classified by state and specialty for your convenience. Contact publisher for listing rates: Quirk's Marketing Research Review, P. O. Box 23536, Minneapolis, MN 55423. Phone 952-854-5101. Fax 952-854-8191. Or visit www.quirks.com/media/moderator.asp.

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(See advertisement on p. 28)

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(See advertisement on p. 72)

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(See advertisement on p. 22)

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(See advertisement on p. 114 and Insert)

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(See advertisement on p. 35)

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By Joseph Rydholm, *Quirk's* editor

School is now in session

With the leaves changing color and footballs flying through the air, it's clear that autumn is here. Fall also means back-to-school time. If you or someone you know could use a little refresher course on the basics of research, you may want to check out three new books in the U.K.-based Market Research Society's "Market Research In Practice" series.

In the first, *Market Research In Practice - a Guide to the Basics*, authors Paul Hague, Nick Hague and Carol-Ann Morgan do a nice job of explaining the whole process of research, from the initial inkling of the need to do research through reporting the results. The main chapters cover secondary research (here referred to as desk research), focus groups, depth interviewing, observation, face-to-face interviewing, telephone research and online research. These chapters are broad in scope but still give a marketer unfamiliar with the various research techniques a good overview of their strengths and weaknesses and when and how to use them.

Both new and more experienced researchers will likely benefit from Martin Callingham's *Market Intelligence - How and Why Organizations Use Market Research*. One strength of his approach is that he acknowledges the pressures facing internal researchers - the power struggles, the internal politics - and therefore presents a realistic view of the process by touching on issues that other research texts either sidestep or ignore. He also gives a clear overview of the roles of research within companies, and spends some quality time exploring the differences between qualitative and quantitative information. Industry veterans will no doubt be familiar with much that is here but they may find the book a good resource for educating junior employees on important issues surrounding the research practice - particularly the chapters on the buyer-supplier relationship and managing the research process from within the company.

In *The Effective Use of Market Research - How to Drive and Focus Better Business Decisions*, Robin J. Birn has compiled a comprehensive and readable handbook to guide a company's data-gathering processes. Everything from setting up an information system to dealing with research companies is examined. With so much ground to cover, Birn touches lightly on a number of topics, but he certainly dispenses solid, practical advice. And his well-informed brevity means that this book, like the other two mentioned, deserves a spot in any new researcher's library as a handy quick-reference. | Q

Market Research In Practice - a Guide to the Basics (244 pages; $32.50), by Paul Hague, Nick Hague and Carol-Ann Morgan; *Market Intelligence - How and Why Organizations Use Market Research* (224 pages; $32.50), by Martin Callingham; and *The Effective Use of Market Research - How to Drive and Focus Better Business Decisions* (226 pages; $32.50), by Robin J. Birn, are published by Kogan Page (www.kogan-page.com).

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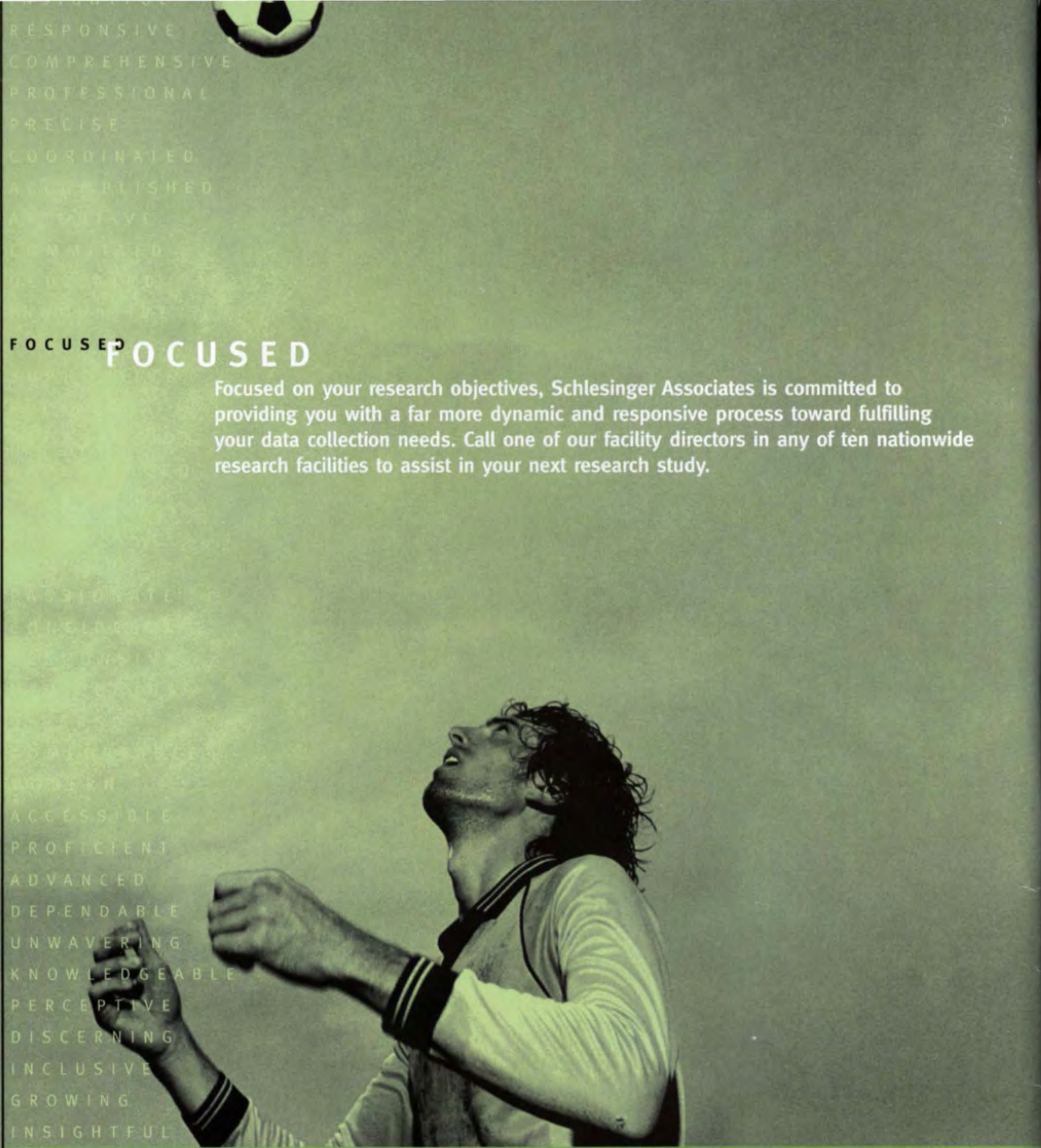

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