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October 2015
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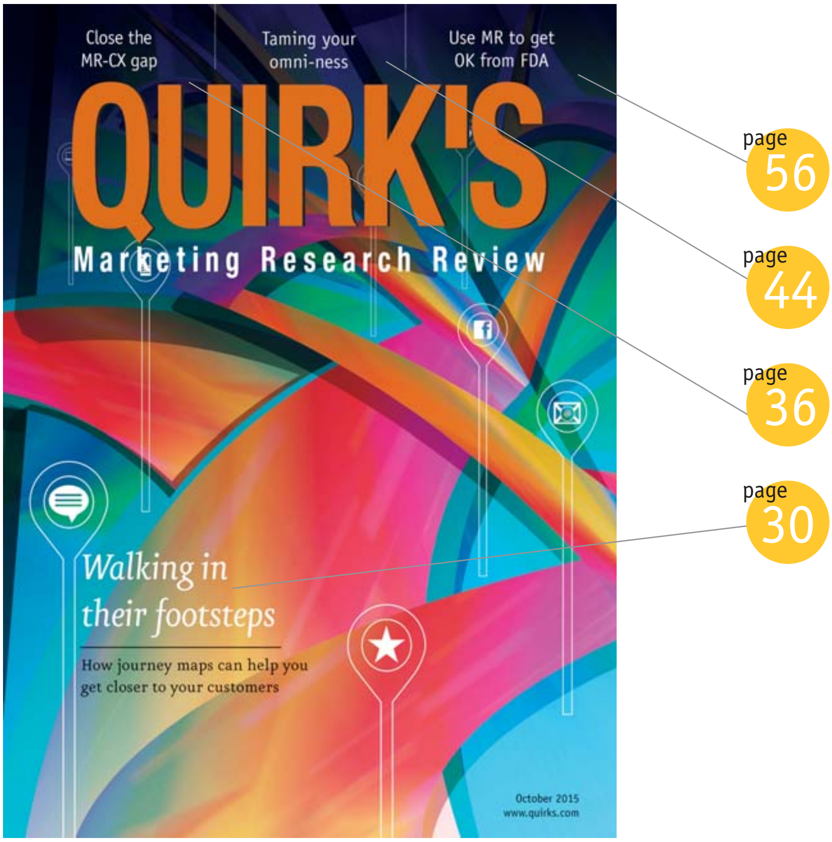

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ON THE COVER

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••• the quirk's event 2016

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••• brand research

Study finds counterfeiting can benefit brands

Counterfeit products have the power to stimulate innovation in the fashion industry and benefit consumers, according to a study published in *Marketing Science*, a journal of the Institute for Operations Research and the Management Sciences, Catonsville, Md.

The authors of "Untangling searchable and experiential quality responses to counterfeiting" investigated how brands react to counterfeits and what are the effective means of enforcement against counterfeits. They studied financial statements of 31 brands selling fashion leather and sports shoes in China over a 12-year period. During this time, counterfeit production surged due to a change in the government's enforcement policy.

The study outlines scenarios where counterfeits in the market can stimulate authentic producers to improve aesthetics for high-income consumers and improve affordability for low-income consumers. In these cases, many consumers are, in fact, better off.

Most observers assume that counterfeits are bad for producers of original genuine products. However, the authors found that such producers react to counterfeiting by using superior materials and better shoe designs, whereas no corresponding improvements occur for knock-offs.

When counterfeiters fool too many customers, authentic brands step up their design game. The authentic producers make the most of their cost advantages to produce more highly differentiated goods from the counterfeits, which shoppers can easily identify as real. Consumers benefit from this strategy because part of their satisfaction derives from superior aesthetics.

quirks.com/articles/2015/20151001.aspx

••• the internet of things

We'll be hearing more about 'hearables'

A Retail Dive article, via Biz Report, argues that "hearables" – wearable products that deliver audio cues to users and accept voice-activated commands – are set to have a huge impact on the Internet of Things (IoT) phenomenon, likely delivering many new capabilities, even voice-activated shopping, to consumers.

Hearable technologies are projected to rack up $5 billion in sales by 2018, according U.K.-based Wifore Consulting, or about the same amount as the entire wearables market will take in this year. Why? They tend to be more discreet than other wearable interfaces and people are already accustomed to in-ear technologies.

The real potential for hearables lies in their ability to function as a listening device. Similar to Apple's Siri and Microsoft's Cortana, most hearables will accept spoken commands, which means they can be used to perform any number of IoT functions, from turning off the lights to ordering groceries. Equipped with two-way, in-ear hearable devices, people could soon be able to perform practically any shopping function – from finding a store, to ordering an item, to making a payment – from any location within the range of one's voice.

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MULTIMODAL DATA COLLECTION CAPABILITIES: IN-PERSON, INTERNET, MAIL, MOBILE, TELEPHONE

By Joseph Rydholm, Quirk's Editor

Readers share insights on difference-making MR methods, practices

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Joe Rydholm can be reached at joe@quirks.com

This past summer, as part of our annual survey of corporate researchers for our Corporate Research Report (CRR), one of the open-ended questions asked insights pros to tell us which tools or techniques have had the biggest impact on their deliverables in the past year. (The report was included with this year's Researcher SourceBook, which mailed in September, and if you didn't get a copy, e-mail me a note and I'll be happy to send you a PDF.)

Going in, you might expect the comments to center around some of the newest or most talked-about methods, with respondents excited to share tales of their recent wins. There certainly was some of that:

"The incorporation of brain science techniques into some of our studies has given us another way to capture insights and get to the emotional response."

"Social listening and text analytics are new for us and have driven some action."

"Biometrics, because it provides specific feedback on what respondents are actually doing vs. what they think they're doing."

"Predictive analytics has allowed us to streamline data into manageable/actionable bursts of activity."

quirks.com/articles/2015/20151002.aspx

"Text analytics has allowed us to get more use out of all of our survey verbatims at a macro level. Before, they were only used at the micro level where teams could read their individual comments."

"Having online respondents use hot-spot or heat-mapping tools has helped improve the usefulness of our technical literature."

But there were also several mentions of tried-and-true approaches as well:

"Traditional research continues to give us the most actionable insights!"

"It's not really a tool or technique but we are getting much better at tying all our data together into the big picture."

"We've increased our use of multi-mode research, coupling qual (often telephone IDIs) with quant survey research. We're finding this more influential with decision makers, giving them the 'what' and 'how many' together with the 'why' and 'what else' that qual provides."

"Telephone interviewing. Thirty percent of our customers do not have Internet access."

"Conjoint analysis has been exceptionally helpful because it provides some implicit information, in addition to the answers the respondents are providing directly. It helps us get an idea of where to start when considering entering new markets."

"Secondary research. [It gives us the ability] to collect information that other groups have compiled, thus reducing cost and time of getting information."

Also in evidence are researchers' creativity and resourcefulness, seeing a problem that requires solving or meeting a need that isn't being met at present:

"We set up an online community/panel for a hard-to-identify group of customers and potential customers. This allowed us to survey them quickly and frequently during a key part of our agile product development process."

"We developed a cross-functional in-person ethnography team that has created a new capability within our MR dept."

"We built our own research panel – really saving us a lot of $; can do more for less, quicker."

"Without a doubt, it's the use of creative design firms to convert dry research data into visually engaging content that can be understood and communicated both internally and externally."

Mix of old and new

In the end, a mix of old and new, implemented with prudence and care, seems like an effective way to go for this and other CRR survey respondents:

"It's not about fancy technologies or techniques. It's about being smart in developing the research and skillfully analyzing the results. This new stuff like gamification, mobile surveys, facial recognition, etc., is way overblown. They're just different ways to do things. I'm more interested in the thinking that goes into the studies and the valuable and insightful results."

IN FOCUS

••• a digest of survey findings and new tools for researchers

// Survey Monitor

••• financial services research

Singles not planning for retirement

Still, overall retirement savings trending up

The population of single U.S. adults is increasing, comprising a larger percentage of households than ever before, partially due to a trend in consumers staying single longer. However, new research from Mintel's Retirement Planning U.S. 2015 report reveals that only half of U.S. singles (51 percent) have a retirement savings account, compared to seven in 10 (68 percent) of those living with a partner and a full 84 percent who are married.

Mintel data shows consumers have begun to take retirement saving more seriously. The percentage of U.S. households that have a retirement plan is 72 percent, up from 65 percent in 2013. However, most Americans are not as involved in saving for retirement as they could be. Only three in 10 adults save the most they can afford to save for retirement, with just 27 percent contributing the maximum allotment to their plan. Furthermore, nearly one-quarter (22 percent) of consumers who have an employer-sponsored plan contribute only enough to get the employer match.

quirks.com/articles/2015/20151003.aspx

"More Americans are staying single longer and our data shows this trend will hold out for the foreseeable future. Millennials, in particular, are choosing to stay single longer, establishing households either alone or with a partner without feeling the need or desire to get married. Because they are young, however, they may be hesitant to start saving for retirement. By postponing saving they are losing the benefit of time which allows their savings to accumulate and grow," says Robyn Kaiserman, financial services analyst at Mintel. "Whether consumers are heeding lessons learned during the recession, have more money to save or more are working for employers who offer plans, we're finding that Americans have begun to take retirement saving more seriously."

According to Mintel research, few Americans (25 percent) are confident that Social Security will be there for them when they retire, with confidence especially low among Millennials (20 percent) and Gen X (14 percent). However, even fewer are saving enough, as only 24 percent of adults feel they are on target to have enough money to comfortably retire when the time comes. This indicates that most consumers believe they are likely to experience a shortfall once they retire. In fact, consumer confidence in the ability to comfortably retire seems to be decreasing, as data from Mintel's Consumer Attitudes toward Retirement Planning U.S. 2013 report shows that 36 percent of consumers believe they were on target to retire at age 65 or before. There is some good news, however, with 27 percent of adults saying they are making financial sacrifices now in order to save for retirement.

Above all else, consumers are concerned that they do not understand how their retirement plan works (65 percent). For example, more than half (56 percent) don't understand the investment options available to them. Another problematic issue is that more than half of respondents


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who are parents believe that saving for their children's education is more important than saving for retirement (56 percent).

Other barriers to retirement savings center around concerns with handling money and vary by generation. More so than older generations, Millennials (45 percent) and iGeneration (43 percent) believe they would be saving more for retirement if they had an adviser to help them. Many, including Gen X, already know they should be saving more but aren't either because they can't afford to (61 percent) or because they haven't gotten around to it yet (49 percent).

"Retirement planning continues to be a challenge in the U.S. Although the recession taught consumers what is at risk if they don't save, most either aren't willing or able to put aside what they will need for retirement. However, there is evidence that the situation is beginning to improve. Retirement plan balances are trending up, more companies are automatically enrolling employees in employer-sponsored 401(k) plans and the U.S. government has begun to offer savings products to people who might not otherwise be able to save. The fact remains, even among consumers who are saving, most savings will fall short. More effort needs to be made by all parties involved to make sure consumers are taking the necessary steps to enjoy a comfortable retirement," says Kaiserman.

••• automotive research

Miles to go

Americans not too charged-up about hybrids, plug-ins

Electric cars – encompassing the full battery of products ranging from traditional hybrids, plug-in hybrids and pure electric vehicles – have seen some impressive benchmarks come and go in recent years. 2013 and 2014 each saw sales for this segment exceeding the half-million mark and 2015 is on track for a repeat. As of the end of July, nearly 290,000 vehicles with a battery generating at least some of their momentum have been sold in the U.S., including nearly 120,000 plug-in models (whether pure electrics or plug-in hybrids).

But while that is indisputably a lot of vehicles, 2015 sales numbers to date still represent the same 3 percent of total U.S. vehicle sales seen in 2012, before some major players joined the charge. But what might lie ahead for the segment?

Just under half of American car owners (or anticipated owners) say they'd consider a traditional hybrid the next time they're in the market for a new vehicle (48 percent, identical to 2013 findings); lower consideration levels were recorded for plug-in vehicles, whether they be hybrids (29 percent, up 2 percentage points) or pure electrics (21 percent, also up 2 points). An additional two in 10 would consider a diesel (19 percent, up 3 points), while 35 percent would consider a smaller or gas-powered vehicle to save on operating costs (down 3 points).

These are among the findings from a Harris Poll of 2,225 U.S. adults (aged 18 and older) surveyed online from May 20-26, 2015.

Most of these vehicles appeal more to some groups than to others. Millennial drivers are more likely than their elder counterparts to consider a traditional hybrid, with 57 percent saying they'd consider one (vs. 49 percent of Gen Xers, 43 percent of Baby Boomers and 38 percent of Matures). This same trend holds true for plug-in hybrids (39 percent vs. 28 percent, 22 percent and 23 percent) and pure electrics (34 percent vs. 17 percent, 14 percent and 11 percent), as well as for diesel vehicles (27 percent vs. 16 percent, 17 percent and 9 percent).

Men are more likely than women to consider an electric vehicle (25 percent men, 17 percent women) and more than twice as likely to indicate that they'd consider a diesel (28 percent men, 11 percent women).

Distance drivers – those who travel over 50 miles in an average day – are especially likely to say they'd consider a plug-in hybrid (38 percent, vs. 28 percent of those traveling 30 miles or less in a typical day), a pure electric (32 percent vs. 18 percent) or a diesel (28 percent vs. 17 percent).

Democrats and Independents are more likely than Republicans to consider a traditional hybrid (53 percent Democrat, 52 percent Independent and 42 percent Republican), a plug-in hybrid (34 percent, 32 percent and 20 percent) or a pure electric (26 percent, 25 percent and 10 percent).

When asked to select their top concerns related to pure electric vehicles, price (67 percent) and range (64 percent) rise to the top, followed by repair/maintenance costs (58 percent), reliability (53 percent), performance/power (50 percent) and the fact that it's still new technology (42 percent).

Price (73 percent Matures, 71 percent Baby Boomers, 63 percent each Gen Xers and Millennials) and range (75 percent, 75 percent, 58 percent and 52 percent) are especially strong concerns among older Americans.

What does this mean? Well, for one thing it means that American drivers' top concern when considering a new vehicle – reliability, which 93 percent rate "very important" – is not among the top barriers standing in the way of electric car adoption.

But money talks: In addition to being the top barrier to electric car adoption, purchase cost is the second most important consideration when looking at a new vehicle (with 81 percent considering it very important). Right now hybrids and electrics still come at a premium when shopped against otherwise comparable vehicles but those comparative costs are slowly going down. Time will tell whether this might lead to stronger sales.

••• shopper insights

In-store experience still matters to shoppers

Major-purchase journeys getting shorter

Even with the increasing influence of digital technology on retail habits, the in-store experience is important in all major purchase decisions, with an overwhelming majority of shoppers buying in-person. At the same time, shoppers continue to carefully research major purchases of $500 or more, including financing options.

Findings from Stamford, Conn.-based Synchrony Financial's Major Purchase Consumer Study confirm that while 80 percent of major-purchase shoppers start with online research, most tend to finish the deal inside of a store.

The latest study explored attitudes about shopping and spending habits, financing and the path to making major purchases across 13 categories: appliances; automotive service, tires and products; electronics; eyewear; fine jewelry; flooring; home improvement; furnishings; bedding and mattresses; lawn and garden; musical instruments; sewing; and sports and fitness equipment.

More than 3,400 Synchrony Bank cardholders and random shoppers who had made a purchase of $500 or more in the past six months, or planned to make such a purchase, participated in the survey conducted in May 2015 by research company Rothstein Tauber Inc.

A key finding of the study is that the major purchase journey is getting shorter, with shoppers spending an average of 68 days researching a product (down from 80 in 2014).

Digital tools continue to be an important part of the research process, empowering shoppers to navigate information and narrow options. Online purchasing of larger-ticket items remained stable at 13 percent year-over-year, with the exception of consumer electronics.

The in-store experience matters more than ever, with 73 percent conducting research during their visit and 87 percent of respondents purchasing in person. Sixty-four percent of all shoppers surveyed said in-store visits had a greater influence on their purchasing decision than online research.

Financing continues to play a critical role in the major purchase process, with 75 percent of Synchrony cardholders surveyed saying they "always" seek promotional financing when making a purchase, and 89 percent indicating promotional financing makes larger purchases more affordable.

Results show that shoppers enjoy the immediacy and interaction of in-store purchases. Shopping in-store allows them to take the product home on the same day, see and feel the product, and interact with a store associate. Some respondents noted they simply like to shop at the retailer.

"These insights are a valuable reminder for retailers of the importance of the in-store experience as part of a true omnichannel strategy," says Toni White, chief marketing officer, Synchrony Financial. "Providing an integrated and consistent experience across all channels bridges shoppers from online sources of information to visit a physical store, validate their choices, and ultimately purchase."

Shoppers continue to carefully conduct research via a number of channels prior to making their major purchase. Steps in their path-to-purchase include product research online and off such as store visits, consulting friends and family, exploring offers and financing and checking online reviews. Consumers who purchase online are driven by value and availability and said they liked the ease and convenience, found better deals on the Web or bought items not stocked in the store.

www.synchronyfinancial.com

••• pet research

This just in: We pamper our pets

Who's controlling the leash, anyway?

How do you define family? If you're a pet owner, you're likely to use the term "family" to include more than just blood relatives in your own species. In fact, people treat their furry and feathered companions more like family members than ever, pampering them with treats, gifts, toys – even home-cooked meals.

Just how deep are our ties with our pets? According to a recent Nielsen survey conducted by Harris Poll, 95 percent of U.S. pet owners consider their pets to be part of the family. And in looking at how much we spend on our pets, it's clear that U.S. consumers are sparing no expense when it comes to their "families."

Today, 62 percent of Americans have at least one pet in their household, so it's easy to see how we spent $19.7 billion on pet care last year alone. Who's spending the most? In terms of pet ownership, two generations take the kibble: Millennials (65 percent own pets) and Gen X (71 percent own pets).

When it comes to which types of pets are in today's households, dogs sit pretty on top: 71 percent of pet owners say they have at least one dog; half (49 percent) have cats; one in 10 have fish (11 percent); and less than one in 10 have a bird (8 percent) or some other type of pet (9 percent).

And to keep their pets happy at mealtime, Americans shell out big bucks, making pet food a thriving, multibillion-dollar industry.

And we like to keep our pets' bellies full round the clock. In fact, Americans spend $2.6 billion of the more than $9 billion spent on dog food annually purely on dog treats. But we're not just rewarding dogs for good behavior. We also spend $476 million on cat treats.

But we do more than just pamper our faithful companions with food. Forty-five percent of owners buy birthday presents for their pets and 64 percent buy them gifts on holidays. While Gen Xers own the most pets, Millennials are the most likely to buy birthday presents for their pets: 54 percent of Millennials give birthday gifts, compared with 40 percent Gen X, 42 percent Baby Boomers and 27 percent Matures (69+). Millennials are also most likely to dress their pets in clothing.

So when it comes to birthdays and holidays, what are we gifting to our pets? Toys of all kinds are hot sellers. U.S. consumers spent $389 million on pet toys alone last year, with $32 million being spent on chew toys and $8 million on pet ropes.

Just like we do with our other family members, we're quick to jump into action when our pets aren't feeling well. And that level of care doesn't come cheap. We spend $389 million on medicine, $19.2 million on pet treatments, $2.4 million on pet repellent and $379.1 million on flea and tick products.

But when our pets are well, we definitely want them looking their best. Americans spend $166 million each year on pet grooming and $11 million on new brushes.

Whether furry, feathered or finned, pets in the U.S. continue to develop close relationships with their owners, and Americans are going to great lengths to ensure that they really do have it all.

The insights reported here were derived from the following sources: an English-language survey conducted by the Harris Poll of 2,205 U.S. adults, 1,323 of whom have at least one pet, surveyed online between May 20 and 26, 2015; Nielsen Answers data July 31, 2015.

••• education research

Family spending on college on the rise

Those who borrow look for more cost-savings

The Bank of Mom and Dad is open for business as parent out-of-pocket spending became the No. 1 source of college funding, according to How America Pays for College 2015, the national study from financial services firm Sallie Mae and researcher Ipsos. This year's report – now in its eighth year – found parent income and savings covered the largest share of college costs, 32 percent, surpassing scholarships and grants (30 percent) for the first time since 2010.

Families covered the balance of college costs using student borrowing (16 percent), student income and savings (11 percent), parent borrowing (6 percent) and contributions from relatives and friends (5 percent).

After four years of relatively stable spending, families spent 16 percent more money on college in academic year 2014-15, for an average cost of $24,164, including tuition, room and board, living expenses, and other direct and indirect costs. At the same time, fewer families were worried that economic factors would affect their ability to pay for college, fewer eliminated colleges from consideration due to cost, and fewer took actions (cost-saving measures) to control college costs.

"The increase in the amount families are spending appears to be less about the rising cost of college and more about the choices parents and students are making about how much they elect to pay for college," says Michael Gross, vice president and head of the higher education practice at Ipsos Public Affairs. "Traditional economic concerns, such as job loss, declining home values and decreased value of savings, are less-worrying for parents this year, allowing families greater freedom to concentrate on college."

Sixty-two percent of families did not borrow any of the money they used to pay for college during academic year 2014-15. Among those who did, the responsibility for borrowing fell primarily to the student, with students signing for nearly three-quarters of the funds borrowed.

Those students and families who did borrow, however, took more cost-saving measures to afford college than those who did not borrow. Eighty-nine percent completed the Free Application for Federal Student Aid, compared to 78 percent of non-borrowers; 73 percent of students worked while attending school, compared to 68 percent of non-borrowers; and 68 percent of students reduced personal spending, compared to 55 percent of non-borrowers.

Working students are now the norm as 74 percent of students worked during the year to help cover costs. Most worked year-round, found employment in food service or retail and worked an average of 22 hours per week.

The overwhelming majority of families (97 percent) agreed college is an important and worthwhile investment, yet only 40 percent have a plan to pay for it. In families with plans, however, students are more likely to pursue a bachelor's degree, there is more willingness and ability to spend on college and students borrow 40 percent less than those without a plan.

"College remains a priority for parents and they are feeling more confident as they reach into their own pockets and put their money where their values are," says Raymond Quinlan, chairman and CEO, Sallie Mae. "It's gratifying to see families are borrowing responsibly and making efforts to reduce costs. Still, too few plan for their college investment."

How America Pays for College 2015 is based on the results of 1,600 telephone interviews Ipsos conducted in April 2015 of 800 parents of undergraduate students and 800 undergraduate students between the ages of 18 and 24. Data and years shown reflect academic years (July 1 to June 30). The report and a related infographic are available at salliemae.com/howamericapaysforcollege.

IN FOCUS

Product and Service Update

••• shopper insights

New sensing platform for retail environments

Uses IoT architecture

In-store behavior analytics firm VideoMining Corp., State College, Pa., now offers a new sensing platform called OmniSensr for retail environments. The integrated hardware package combines video, Wi-Fi and beacon technologies. The platform is optimized for anonymous shopper tracking and generation of behavior analytics – from storewide tracking to shelf-level interactions with demographic segmentation. All processing is carried out onboard in real time, eliminating the need for large, elaborate hardware in stores. Employing an Internet-of-things (IoT) architecture, the sensor's outputs can be integrated in a cloud environment with transaction data and other data sources (store map, product layout, promotions, etc.), facilitating the ability to provide repeat visitor analytics, store-wide tracking, trip-type analysis and brand-level behavior analysis. In addition to the shopper behavior analytics, the technology enables mobile location-based marketing to allow retailers and manufacturers to serve targeted content to shoppers at the point of decision in the form of promotions and relevant product information.
www.videomining.com

quirks.com/articles/2015/20151004.aspx

••• LGBTQ research

IPhone app enables participation in LGBTQ study

Examines priority health issues, disparities

Tustin, Calif., firm Thread Research announced a new iPhone app that gives the LGBTQ community a way to participate in the University of California, San Francisco's PRIDE study of the LGBTQ population. It is the first population-level longitudinal study of LGBTQ health and will help researchers gain insight into priority health issues as well as unique health disparities in the LGBTQ population. The app will enable real-time consent, enrollment and participation in the study from the iPhone and will allow LGBTQ participants to voice their health concerns so researchers can crowdsource health topics that are important within the LGBTQ community in order to design the longitudinal questionnaire.
http://threadresearch.com

••• DIY research

Microsoft launches free DIY research service

For surveys, audience engagement, ad tests

Microsoft's Bing Pulse has launched Pulse for Market Research, a free, self-service solution for surveys, live content rating and moderated response groups of any size. It supports the measurement of real-time TV audience engagement through instant sentiment tracking and surveys for response groups, ad and video tests and audience studies. Some of the features include: pulsing (stimulus response) and polling functions; the ability to live-stream a video or event through Azure Media Services or Ustream; customizable voting pages; API access to gather raw data in real-time and the ability to upload content for participants in the platform and allow participants to share ideas and thoughts through Yammer chat rooms. It also runs a Web interface that works on any connected device and can be iFramed into any Web site or app.
http://pulse.bing.com/pulse-for-research

••• predictive modeling

Modeling technique simulates purchase journey

Borrows from epidemiology

London global media agency MEC has unveiled MEC Velocity, a predictive modeling technique borrowed from epidemiology to create purchase journey simulations and predict consumer behavior and interactions with brands. The technique builds on MEC

Momentum, the agency's proprietary approach to understanding consumer purchase decisions. MEC Velocity allows the agency to build simulations that run into the future, predicting consumer behavior and interactions with brands and services and the impact on sales and market share in a category. It can then simulate experiments by changing key metrics or campaign engagement to see how fast and by how much they will affect consumer behavior and then sales.
www.mecglobal.com

••• political research

Research Now debuts U.S. voter panel

Can survey based on party, district, other variables

Plano, Texas-based Research Now has launched a U.S. voter panel that allows political researchers to capture the perception of American voters on the latest issues. The panel provides insights into political trends like candidate perception, voter turnout, key campaign issues and insights into the perceptions of Millennials. Pollsters and political researchers can access a targeted audience of over 600,000 voters from every state and U.S. Congressional district with the new panel and can survey constituents based on their party affiliation, historical election turnout, congressional district and other key political variables. The design enables panelist participation in surveys via smartphone, tablet or PC.
www.researchnow.com

••• mobile research

Apple Watch app from 20|20 Research

For QualBoard Mobile platform

Nashville, Tenn., firm 20|20 Research has launched an Apple Watch market research app for the company's QualBoard Mobile platform. The app is a free update for all research participants who download the QualBoard Mobile iOS application and is designed to increase engagement in mobile qualitative research studies with reminders and push notifications. Apple Watch users can touch the notification sent to their wrist to respond to survey questions via the QualBoard Mobile application. 20|20 Research is expected to release an updated version of the app this fall, with enhanced features and more on-device capabilities.
www.2020research.com

••• Briefly

■ Skokie, Ill., research industry information firm RFL Communications Inc. has released the RFL Global Top 50, a list of the top 50 research organizations along with a list of the top 10 big data analytics insight organizations.
http://rflonline.com

■ Boston firm Cintell launched its cloud-based customer intelligence platform that allows businesses to create, manage and share data-rich SmartPersonas (the company's digital model of ideal customers) throughout their organizations. Cintell's proprietary analytical model Cintelligence, the core of the new platform, is used to combine primary research, big data insights and actual user behavior to create and maintain actionable customer intelligence.
http://cintell.net

■ Germany software supplier SmartMunk has launched story.ly, a software for text analysis that analyzes customer feedback from responses to customer service, continuous customer satisfaction surveys and reviews of online panels. It also reduces the complexity of all unstructured text data and delivers the key messages.
www.smartmunk.com/wp

■ Washington, D.C., strategic digital communications and marketing agency Delucchi Plus unveiled its Insights product line, which offers a range of research products and analysis to provide context and next steps for clients. Insights provides online positioning, competitive review, sentiment analysis and audience identification as well as communication tools like Webinars, public speaking and a bimonthly digital trends report.
www.delucchiplus.com

■ San Francisco mobile marking automation firm Swrve has launched the Swrve Predictive Marketing Suite, a combination of predictive analytics with messaging and conversations for mobile apps. It uses behavioral algorithms to predict which app users will use next and automatically present relevant communications to customers. It is designed to allow mobile marketers to create better user engagement while growing revenues and reducing risk of churn.
www.swrve.com

■ Amsterdam firm Winkle released its latest Concept Screener offering, which provides qualitative measurements combined with emotional analytics via the company's new proprietary engine, Pansensic. Pansensic decodes unstructured narrative to identify true, unfiltered consumer intentions that matter in product development.
www.winkle.eu

■ Redmond, Wash., analytics and insights provider Blueocean Market Intelligence has released upgrades to LiNK, the company's end-to-end software

that aggregates primary market research data and connects it to other sources, allowing integrated data analysis across brands, product lines, languages and geographies. The latest upgrades include a more powerful reporting interface, improved visuals and a suite of new tools for connecting survey data to general analysis and business intelligence.
www.blueoceanmi.com

■ Mountain View, Calif., social media analytics company NetBase announced PowerTags and Sentiment Classification. PowerTags enables NetBase customers to categorize insights for organizing and mapping social information and provides a space for users to build their ideas to support development of marketing approaches like consumer journeys, paths to purchase and target personas. Sentiment Classification lets users adjust sentiment based on their project needs and business objectives.
www.netbase.com

■ New York firm Easy Analytic Software Inc. has introduced the Right Move, a mobile app designed for business, real estate, education and personal use on iOS and Android devices that provides location, neighborhood and site evaluation information. It offers prospective homeowners, realtors, brokers and anyone scouting for a location key current neighborhood demographics.
www.easidemographics.com

■ Los Gatos, Calif., big data analytics firm Kyvos Insights now offers its flagship product Kyvos, an online analytic processing solution for Hadoop, a software solution that processes big data. It enables business users to derive insights from their data for more informed decision-making with no programming required and allows businesses to convert raw data into insights.
www.kyvosinsights.com

■ Amadeus, a Madrid, Spain-based IT solutions firm for the travel and tourism industry, has launched Amadeus Agency Insight, a travel intelligence suite of products and services that help travel agencies leverage big data technologies by turning market and traveler data into actionable insights including new routes and markets to address, travelers' search behavior and performance against competitors.
www.amadeus.com

■ Renaissance Research and Consulting, New York, has introduced ItemSat, an algorithm for accurately measuring the importance of consumer product attributes. ItemSat is part of Renaissance's ICSS customer satisfaction system.
www.renaiss.com

■ Amsterdam research software supplier Nebu has launched Dialer as a Service (DaaS) for research and fieldwork firms that conduct telephone interviewing in-house. DaaS allows interviewers to connect their headsets to the computers already in place, log in to the DaaS site and start calling without upfront hardware costs and no minimum time contract.
www.nebu.com

■ Nashville, Tenn.-based 20|20 Research has introduced an online version of dial testing that can include respondents from anywhere in any dial test project, eliminating travel, facility rental and the need for specialized equipment.
www.2020research.com

■ Burlington, Mass., smartphone visual IVR provider Zappix has added a survey package to its smartphone IVR solution, allowing companies to create, distribute and analyze surveys as part of the customer service experience. After each service interaction, the surveys are delivered at a set time to users via smartphone notification alert.
www.zappix.com

■ Ypulse, a New York research firm, has partnered with Austin, Texas, research firm Kinesis Survey Technologies and New York data collection firm Paradigm Sample to develop the Mobile Future Forum, a white-label solution based on Paradigm's native app. The app allows panelists to participate in every portion of a project using a mobile-responsive and user-friendly platform.
www.ypulse.com

■ San Francisco mobile app intelligence platform App Annie has integrated Google Analytics to provide In-App Analytics, a free offering for app developers that allows users to view key usage metrics alongside data from five major app stores and 34 advertising platforms within one unified dashboard. The additional usage data joins performance metrics from existing App Annie products and provides a holistic view into the health of an app portfolio, enabling time saving analysis and optimization.
www.appannie.com

■ Malaysia media company Astro Malaysia Holdings Bhd has partnered with London-based firm Kantar Media to launch a dynamic television audience measurement (DTAM) system to capture and collate viewing data across peninsular and east Malaysia. DTAM will represent viewing behavior of linear channels and high-definition channels, recorded and on demand viewing and will be able to track viewership of advertising spots across all Astro channels.
www.astromalaysia.com.my

■ Flemington, N.J., firm HCD Research Inc. and Frankfurt, Germany, research firm Sensanalysis are collaborating to co-develop and market products and services that integrate neuroscience methods and qualitative multi-sensorial research tools to study emotional and subconscious response to products and the sensory experience. The two companies hope to provide comprehensive testing methodologies that explain how customers perceive products, what the subconscious and conscious contributors to their responses are and how to determine product attributes which can impact product usage.
www.sensanalysis.com

■ Kantar Worldpanel ComTech, a London panel research firm, has launched a consumer panel in India. Consisting of more than 20,000 individual consumers, the new panel represents the growing Indian urban population of age 15 and over, a category representing more than 500 million people. Building on Kantar Worldpanel's existing partnership with Indian market research IMRB International, the new panel will submit 100,000 interviews a year on purchasing behavior, usage, billing, carrier and vendor brand awareness and preference for mobile phones and tablets. That data will be reported to Kantar Worldpanel ComTech clients quarterly, starting in October.
www.kantarworldpanel.com/global

■ India IT solutions provider Mphasis has launched HyperGraf, a solution developed by its research and innovation initiative Next Labs that provides enterprise decision makers with real-time customer engagement insights by analyzing millions of multi-structured data points spread across multiple customer engagement channels. The technology correlates data from multiple consumer touchpoints and external data to build a single view of the customer with recommendations specific to the channels of interactions.
www.mphasis.com

■ Nielsen, New York, has extended its global alliance with Vancouver, B.C., customer experience management software provider ResponseTek to offer the Nielsen Listening Platform, which merges customer experience management software tools with business insights to help drive operational advancement for brands and businesses. Organizations can now manage performance at an individual consumer and store level through transactional surveys and real-time reporting to convert insights into operational improvements.
www.nielsen.com

■ Toronto, Ontario, marketing and analytics platform Turnstyle Solutions launched a new app specifically for the Shopify point of sale (POS) solution. Shopify, a cloud-based consumer platform, opened its Shopify POS app, allowing partners like Turnstyle to help merchants improve the in-store consumer experience. Shopify merchants can now download the embedded Turnstyle app to learn their customers' behavior within their store, provide them with branded Wi-Fi access and engage with customers through proximity messages on their mobile device all from within the Shopify POS.
https://getturnstyle.com

■ MetrixLab, a marketing analytics and research firm based in the Netherlands, has added the availability of mobile norms for optimizing mobile advertising in the U.S., Europe and Asia, offering mobile-in-mobile copy testing and the ability to benchmark against its norms to allow marketers to optimize their mobile executions. The firm's norms test ads on mobile devices and test advertising breakthrough in context.
www.metrixlab.com

■ San Francisco visual dialogue platform GlimpzIt has launched its self-service freemium platform developed to specifically reach consumers via mobile and images, allowing users to start a conversation and receive responses in the form of words, images and videos.
www.glimpzit.com

■ Reltio, a data management firm based in Redwood Shores, Calif., has launched Reltio Cloud 2015.2, the latest release of its data platform. The new version offers various features including granular segmentation and comprehensive audit and is designed to improve insights and productivity for business teams.
www.reltio.com

■ Leominster, Mass., research and technology firm Jibunu has added a coding tool to its platform that enables real-time coding while data is being gathered. The tool, named CODY (Coded Open-ends Done Yourself), is part of the Jibunu Report Portal which allows access to open-ended responses at any time. It will allow researchers to begin the coding process immediately instead of waiting for a project to be completed and gives access to real-time counts, quota management and advanced reporting features. Separately, Jibunu has introduced Roundtable Interview Conversation Kickstarter, or RICK, a product that combines qualitative and quantitative methods with instantaneous reporting to create a way to capture opinions before discussions that could lead to biased responses.
www.jibunu.com

■ Nuremberg, Germany, firm GfK has released the latest iteration of GfK Echo, its customer experience management solution that now has predictive analytics capabilities and better access to insights. It integrates structured and unstructured customer feedback with client and third party data and uses predictive modeling to identify which actions drive sales growth.
www.gfk.com

■ London research firm Tonic Insights has launched Q-Club, a new collaborative working approach that gives its clients additional benefits like free training sessions, thought leadership reports and the availability of desk space and meeting rooms located in central London and New York.
www.tonicinsight.com

■ New York data solutions provider Return Path launched Consumer Insight, its data-as-a-service solution, to make e-mail data on over 2 million consumers' retail transactions and commercial relationships accessible to help analysts understand consumer behavior and market trends. By capturing online purchase receipts, the new solution will give insight into shopping activity and allow for analysis of buying preferences and patterns and offer granular detail like SKU-level data, itemized pricing and delivery information.
www.returnpath.com

■ London customer science company dunnhumby has launched dunnhumby Health, enabling health care institutions to leverage data to understand behavior and identify opportunities to improve patient interactions.
www.dunnhumby.com

■ Costa Mesa, Calif., firm MFour Mobile Research has launched MediaMatch 360°, a product that integrates media matching technology, validates consumer exposure and tests recall and behavior with a real-time view of consumers, allowing clients to see total ad exposures and survey panelists in real-time.
http://mfour.com

■ The Reputation Institute, a research and advisory firm based in New York, has launched a reputation tracker service that gives companies measurements and quarterly reports on their corporate reputations.
www.reputationinstitute.com

■ Provo, Utah, online survey company Qualtrics now offers bitcoin as a rewards option for consumers who respond to surveys and research requests.
www.qualtrics.com

■ Israel-based software solutions provider NICE Systems has launched a new solution that enables organizations to use a combination of voice of the customer feedback and predictive analytics to improve the customer journey in real-time. The new solution allows companies to intercept the customer journey and adapt it to reduce customer effort, improve retention and enhance the customer experience.
www.nice.com

■ New York social media intelligence platform Unmetric has launched Sense, an app that allows marketers to monitor their competitors through live streaming of campaign images, videos and hashtags. Users can select the brands they want to follow from Unmetric's database and pull images and video from social media sites like Facebook, Twitter and Instagram. The company will add YouTube in the coming months. Users can also bookmark specific content and tap individual posts for full text and engagement metrics.
https://unmetric.com

■ Redwood Shores, Calif.-based Oracle has added a customer service management tool to its Oracle Social Cloud that allows companies to use Twitter as a major feature of their customer service offering. The tool uses an algorithm developed by Oracle that processes Twitter interactions and engagement metrics to help brands identify influencers and the impact of social messages.
www.oracle.com

■ Frisco, Texas, health care data collection company GLocal Mind has introduced its proprietary panel and process management software used to increase efficiency and ease of use for clients and in-house teams. The new software automates business processes such as feasibility check, quote creation, reporting and panel management, among other things.
www.glocalmind.com

■ Twitter has launched its Full-Archive Search API, a tool that opens its entire archive of tweets to marketers. Gnip, the Boulder, Colo., social media platform Twitter acquired last year, can access real-time Twitter data with its Historical PowerTrack and 30-Day Search API tools that help customers gain audience insight by analyzing archived posts. The new tool is an extension of the 30-day search solution and gives Gnip customers complete access to over nine years of tweets and allows them to search for any historical public tweet.

■ London research firm Simpson Carpenter has launched Klondike, a program that reads and analyzes text from customer e-mails, open-ended survey questions product reviews and other text and extracts themes and sentiments.
www.simpsoncarpenter.com

■ Needham, Mass., television and digital video advertising firm Extreme Reach Inc. has been granted accreditation for its suite of video ad viewability services by the Media Rating Council, an industry group that audits and accredits media measurement capabilities.
www.extremereach.com

■ The Media Rating Council (MRC) has granted Reston, Va., media measurement and analytics company comScore accreditation for video viewability measurement in the Ad Validation suite of validated Campaign Essentials, comScore's campaign delivery validation and in-flight optimization solution. Additionally, comScore has integrated its video viewability technology with a list of partners to make measurement accessible for a variety of publisher and technology providers. New partners include AOL, Gannett, Videology and others.
www.comscore.com

■ U.K. consumer insight agency Join the Dots has been awarded accreditation from the Market Research Society as a training provider for its graduate development program, which provides training courses and project experience and placements.
www.jointhedotsmr.com

■ Fishkill, N.Y., incentive solution firm Virtual Incentives and Austin, Texas, insight community icanmakeitbetter, who formed a partnership last year, are now increasing their reward offerings for research participants in an effort to increase panel engagement. Virtual Incentives provided icanmakeitbetter with an API integration that allows automatic delivery and fulfillments of gift cards. The two companies customized the offerings, developed new products and built a system to allow faster incentive delivery to respondents, provide ease of use along the research continuum and provide a support staff and customer service to manage the incentives program.
www.icanmakeitbetter.com

The use and abuse of sampling error, confidence intervals and statistical significance

| By Paul Rubenstein

snapshot

Paul Rubenstein looks at several ways researchers can communicate their confidence in the potential accuracy of survey results.

There are about 250 million adults in America, of every imaginable background and circumstance. So how can a survey of only 800 or 1,000 adults reflect what the entire country is thinking? How can a thousand voices speak for them all?

Marketing researchers liken it to making a big pot of soup – to taste-test the soup, you don't have to eat the whole pot, or even a whole bowl's worth. You only have to try a spoonful or two. The same is true of marketing research. You don't have to ask every single person in America to find out what Americans think; you only need to ask a few to get the flavor of the population's opinion.

This fact is reflected by a survey's standard error of the mean. Specifically, the standard error of the mean is an index of the amount of error that results when a single sample mean is used to estimate the population mean; it is an index of sampling error. The standard error of the mean equals the standard deviation of the population of raw scores divided by the square root of the size of the sample on which the means are based.

So, a subject highly related to sampling error and standard error is the margin of error. The lower the margin of error, the larger the sample and the more accurately the views of those surveyed match those of the entire population.

When marketing researchers report the margin of error for their surveys (usually expressed as something like "plus or minus 3 percent") they are stating their confidence in the data they have collected.

quirks.com/articles/2015/20151005.aspx

Confidence interval

You must also remember that every margin of error has a confidence interval, usually 95 percent. That means that if you asked a question from this survey 100 different times, 95 of those times the results would be within three percentage points of the original answer. Of course, this means that the other five times you ask the question, you may get answers that are completely different.

For example, if 50 percent of a sample of 1,000 randomly selected Americans said they are satisfied with their bank, in 95 cases out of 100, 50 percent of the entire population in the U.S. would also have given the same response had they been asked, give or take three percentage points (i.e., the true proportion is somewhere between 47 percent or 53 percent).

The bigger the sample, the smaller the margin of error, but once you get past a certain point – say, a sample size of 800 or 1,000 – the improvement is very small. The results of a survey of 300 people will likely be correct within six percentage points, while a survey of 1,000 will be correct within three percentage points, a lower margin of error. But that is where the dramatic differences end – when a sample is increased to 2,000 respondents, the margin of error drops only slightly, to two percentage points.

Despite this, some surveys have sample sizes much larger than 1,000 people. But why ask 2,000 or 3,000 respondents when 800 will do? Well, it sounds more impressive. But that's

hardly worth the cost of interviewing all those additional people. Usually when a study has a large sample, it is so certain subgroups can be isolated and compared to other subgroups or to the total sample. If you want to compare retired people to the general public, for instance, a sample of 1,000 might yield only 100 or 200 people who are no longer working, which may not be enough to get a solid grasp on the views of that group. A sample of 2,000, however, will probably yield a larger group of retired Americans and provide a more accurate picture of their views, which can be compared to non-retirees' opinions.

Sometimes increasing the overall sample size is not enough, if the subgroup you are examining is rare or particularly hard to find. Affluent households, for example, make up only a small percentage of the U.S. population. In a standard random sample, you would have to interview an enormous number of people before you had a large enough subgroup of affluent households. In this instance, you would take an oversample, purposely seeking out members of the high-net-worth group you are interested in, and comparing the results to the main sample.

Of course, in both general samples and oversamples, who is asked is as important as how many are asked. Reputable survey organizations go to great lengths to make sure their interview sample is random and representative of whomever they are surveying, be it retired, affluent, or all Americans.

Statistical significance

Sometimes, even the best researchers misuse and abuse the concept of significance. Many in research pore over reams of crosstabulations and perform a multitude of analyses to find significant differences and formulate their decisions based on statistical significance. They tend to associate statistical significance with the magnitude of the result. Their reasoning is something like this: "The more statistically significant a result, the bigger the difference between two numbers." In other words, the fact that one proportion is significantly different than another suggests that there is a big difference between the two proportions and statistical significance is often associated with "bigness" of a result.

People often think that if the difference between two numbers is significant it must be large and therefore must be considered in the analysis. It is suggested that when comparing numbers, two types of significance should be considered: statistical significance and practical significance. By understanding the difference between statistical and practical significance, we can avoid the pitfall that many in the research industry make.

What does statistical significance mean? A significance level of, say, 95 percent merely implies that there is a 5 percent chance of accepting something as being true based on the sample when in the population it might be false. The statistical significance of an observed difference depends on two main factors: the sample size and the magnitude of the difference observed in the samples.

For example, let's say we do a significance test between two groups of people who are exposed to a product concept and find a 20-point difference between Group A (65 percent acceptance) and Group B (45 percent). Is the difference statistically significant? Despite the large magnitude of the difference (20 points), its statistical significance will depend on the sample size. According to statistical theory, we need a sample size of about 50 or more people in each of the groups for the difference to be statistically significant at the 95 percent level of confidence. If we meet the sample size requirement, then the difference of 20 points will be statistically significant at the 95 percent level of confidence.

What does this really mean? Many marketers will look at this result and conclude that since there is a 20-point difference and the difference is statistically significant, there must be a big difference between Groups A and B. In reality, if we had done a census (i.e., surveyed the entire population) instead of surveying a sample, the difference between Group A and Group B may have turned out to be smaller. In other words, what this result tells us is merely this: Given our particular sample size, there is a 5 percent chance that in the population represented by this sample, the proportions for Group A and Group B are not different. That's all!

Statistical significance does not tell us anything about how big the difference is. It only tells us the probability with which a difference found in the sample would not be found in the population. Thus, for this case, statistical significance would allow us to conclude that there is only a 5 percent chance that in the population the proportion of Group A favoring the product is not higher than Group B; we are taking a 5 percent risk of concluding a difference exists when there may not be any such difference. If this difference were significant at the 99 percent level of confidence, it would not have become larger. It would only mean that there is a 1 percent chance that the difference observed in the sample would not be observed in the population. Thus, we are only taking a 1 percent risk.

Practical significance

From a marketing perspective, the statistically significant difference of 20 points may be meaningful or meaningless. It all depends on our research objectives and resources. If it costs millions of dollars to reach each additional percentage of the market, we may decide to funnel resources toward Group A since it has a higher acceptance rate. In this case, the difference may be termed a “big” difference because (a) we are reasonably sure (95 percent or 99 percent sure) that the difference observed in our sample also exists in the population and (b) each percentage of difference is worth millions of dollars to the client. Thus, statistical significance should not be used to decide how big a difference is but merely to ascertain our confidence in generalizing the results from our sample to the population.

In another situation, the same difference may be ignored despite the fact that it may be statistically significant. For instance, if the marketing costs are so low that it makes sense to market to both groups, we can ignore the difference (even though it is significant) and treat both groups as if they were the same. We may choose to market to both groups as if they had similar acceptance rates (even though our statistical test was significant).

The logic is the following: although we can be 95 percent sure that the difference observed exists in the population, given the marketing scenario, the difference is not meaningful. Thus, the relevance of a statistically significant difference should be determined based on practical criteria including the absolute value of the difference, marketing objectives, strategy and so forth. The mere presence of a statistical significance does not necessarily imply that the difference is large or that it is of noteworthy importance.

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••• customer experience research

Walking in their footsteps

How journey maps can help you get closer to your customers

| By Jim Tincher

snapshot

Jim Tincher explains journey maps, what they are, how to create them and how to use them.

quirks.com/articles/2015/20151006.aspx

Are you journey-mapping? It's a very popular research method to help you better understand how customers experience your products or services by highlighting your best opportunities for improvement.

In a study of customer experience (CX) leaders, CX consultancy the Temkin Group found that 71 percent planned to focusing more on journey-mapping.[1] Similarly, Forrester Research declared that journey maps are foundational to a customer experience program and reported that "73 percent of CX professionals surveyed … said that their company maps customer experiences from the customer's perspective."[2]

But what exactly is a journey map? While the meaning of the term varies, a common definition of "journey map" is a visualization of how your customers experience a journey such as shopping for a product, calling customer support or using a product for the first time.

Maps can show different types of journeys. Some show the entire customer life cycle from pre-sales to renewal or exit. More frequently, journey maps examine a specific phase of the life cycle. At our firm, we have mapped such diverse journeys as purchasing health insurance, invoicing at a B2B software company and understanding the multiyear membership journey at a large nonprofit.

A journey map's most critical function is to show the experience through your customers' eyes. This requires qualitative research. While some providers promote journey maps created solely in employee workshops, these run the real danger of institutionalizing employee biases as truth. Critical journeys always require outside research to ensure validity.

Journey map designs vary significantly. Some are created in Excel or PowerPoint, essentially grids showing customer steps and corresponding touchpoints. While a map like this does literally capture the journey, it lacks the visual call to action. To ensure visual impact, our practice is to use a graphic designer to create our maps. For this article, we will be using the accompanying examples to highlight critical requirements for a journey map.

While designs vary, several items are consistent across quality journey maps. The core of the map is your customers' steps and the touchpoints used in those steps. In Figure 1, you can see how Passive Pat experiences his recovery from back surgery. Touchpoints may include staff, the Web site of a company or organization or, often, items outside of a company or organization's control, such as Google or friends and family. We find that these external items often have a significant impact on your customer's journey and need to be understood.

Maps need to clearly communicate your customers' emotions. Notice how Pat's comments are captured verbatim throughout the journey. Many maps show a customer's level of positive and negative emotions rising and falling through the journey. The example in Figure 1 instead shows the level of Pat's engagement. High points show engagement with his treatment plan but low points show the danger of his dropping out.

Most maps call out friction points – those items frustrating customers. The map for Passive Pat highlights a friction point with an exclamation point. Friction points require remediation but they are not always the biggest opportunity to improve your customer experience.

The most critical points in a journey are called moments of truth. Different providers have different ways to describe these moments but our usage is based on P&G's original definition: an interaction with a disproportionate

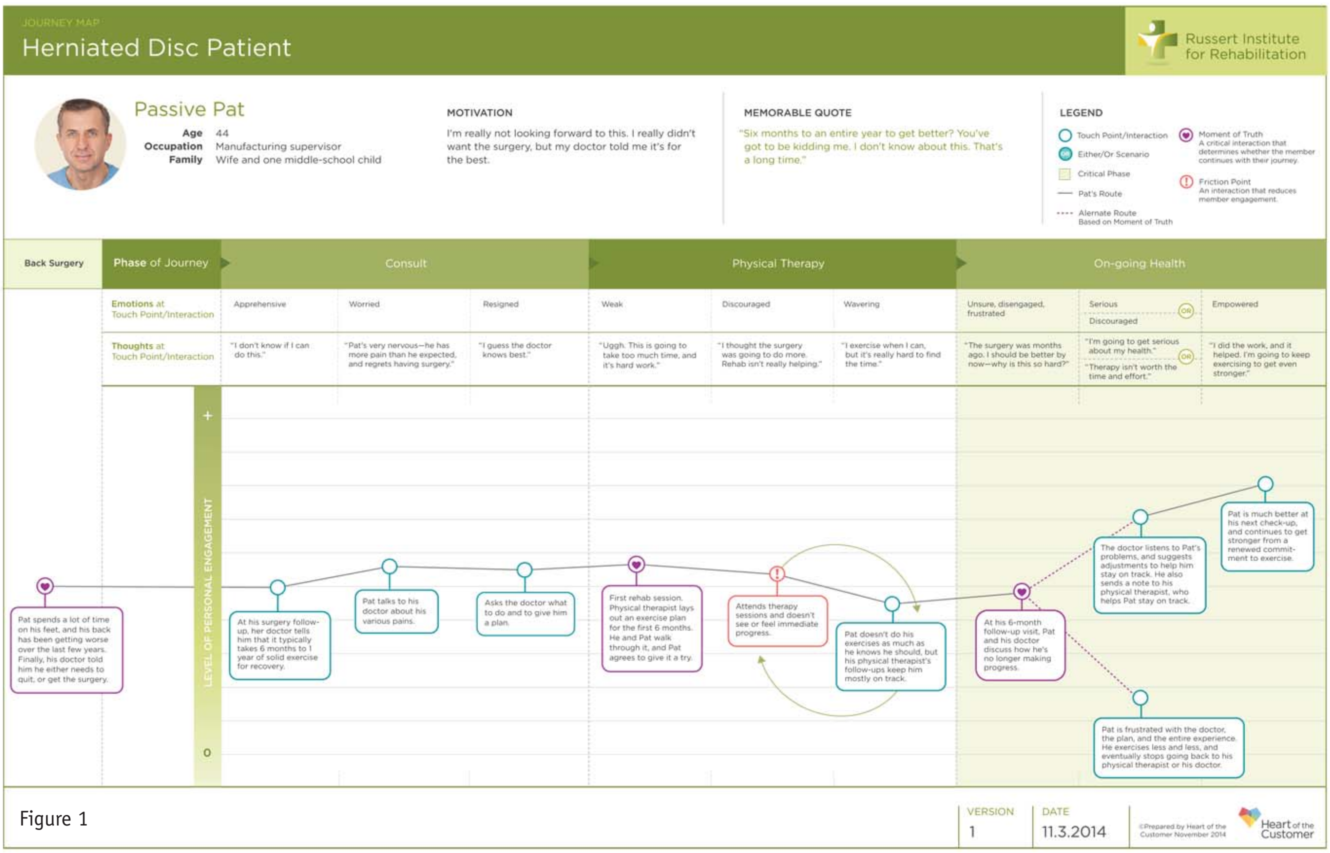


Figure 1

impact on the rest of the journey. Failed moments of truth either cause a customer to exit a journey (such as hearing negative word of mouth in a sales process) or lead to significant ongoing frustration (such as a bad B2B onboarding experience with a new software product). In the example above, Pat's moment of truth is his check-in at six months. If he isn't reengaged in his physical therapy program, he spirals down and eventually quits. If he can be reengaged, he stays with the regimen, eventually returning to full health. Managing their moments of truth is critical to improve your customers' journey and thus their loyalty. (Other elements vary. Our white paper[3] discusses common items found in an effective journey map.)

Outside-in, inside-out

Impactful journey maps are created through both customer research and employee workshops. Research offers an outside-in perspective, showing how customers view their experiences with you. Workshops feature an inside-out view, highlighting employee views. While you should not use workshops alone, they do provide an important complement to research. A complete view of the customer journey requires both customer and employee views, and this is the methodology we will discuss in this article.

Research-based maps. Effective maps are analog, requiring qualitative research. Journey maps have the greatest impact when they highlight emotions. Uncovering these emotions requires direct conversations with customers. While a few providers use a quantitative approach, they run the significant risk of missing customer touchpoints, especially those out of the company's direct control. We always begin with a qualitative approach, although we frequently follow up with quantitative validation of the hypotheses generated during the mapping process.

Just as with other qualitative research, the best methodology varies. Focus groups, ethnographic research and in-depth interviews all have a role, depending on the type of journey.

Focus groups allow multiple customers to map their journeys in a sticky-note activity, allowing you to observe how customers describe their experiences. The group dynamic also ensures that members remind each other of missing steps and gives participants the chance to share their individual stories.

Some journeys are too private for focus groups. A worker who suffered a severe injury will never share with a group of strangers that he now feels like less of a man. Ethnographic interviews or in-depth in-person one-one-one conversations build the trust and uncover the deep emotions.

B2B journey maps often require interviews. For example, insurance agents will never share how they prospect for new business when competitors are in the room.

However, all of these methods risk bias. Participants have a hard time recalling each individual step in the journey but will create answers to fill the gaps – answers that may not accurately reflect what really happened. For example, customers who filed a recent insurance claim will remember the accident and the moment they either did or did not receive compensation but are unlikely to recall all the individual steps between. We use journaling to ensure that participants record those individual moments and their reactions as they happen. We then use the other methodologies to follow up and delve more into the emotions.

Journey-mapping workshops. In journey-mapping workshops, employees document a customer's typical journey. While most use the same journey-mapping term to describe these workshops, Forrester coined the term "ecosystem-mapping." This differentiates it from the research-based maps and is also more descriptive. These workshops go beyond customer steps and emotions to document the employees and systems involved at each step of the journey. (A detailed description of how to run such workshops is beyond the scope of this article but we have developed a SlideShare offering on that topic.[4])

Journey-mapping workshops by themselves are risky. Workshops without research create maps that show how your company views the journey, which is almost always very different from how your customers see it. That said, the employee view is a useful ad-

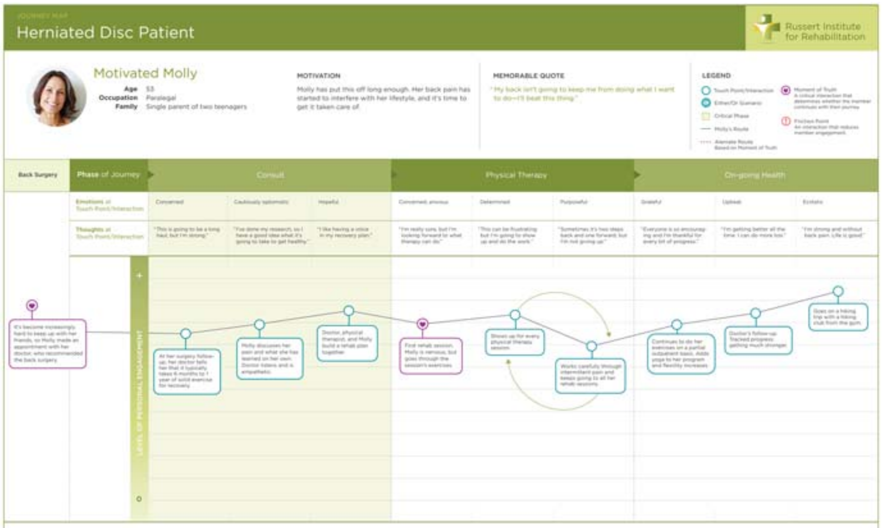


Figure 2

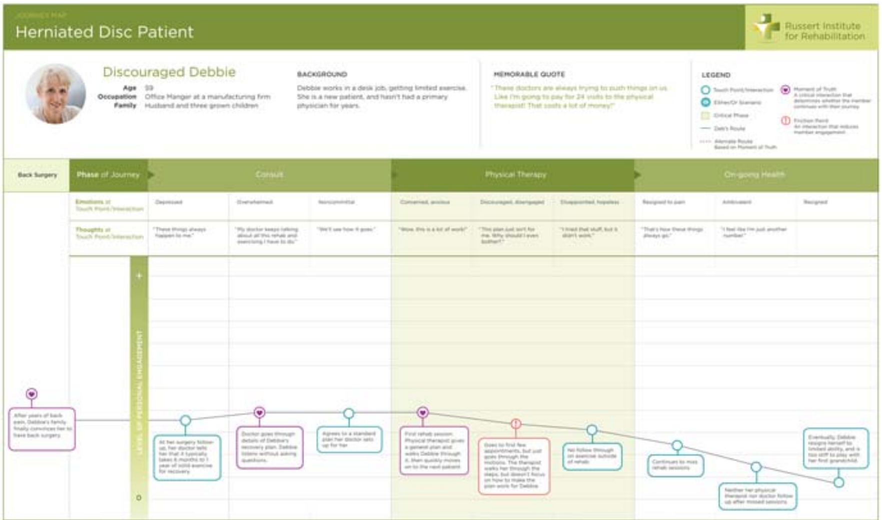


Figure 3

dition to the research. We run abbreviated hypothesis-mapping workshops at the kickoff to gather how employees view the customer journey. We then run full ecosystem-mapping workshops following the research to help employees internalize their customers' views as well as to document the groups and systems involved in the ecosystem.

Six steps

Journey-mapping typically involves six steps. A brief description of each step follows.

1. Select a journey. Defining the scope can be challenging. Define it too narrowly and you miss crucial inputs. Define it too broadly and you miss the detailed emotions needed to fully understand your moments of truth.

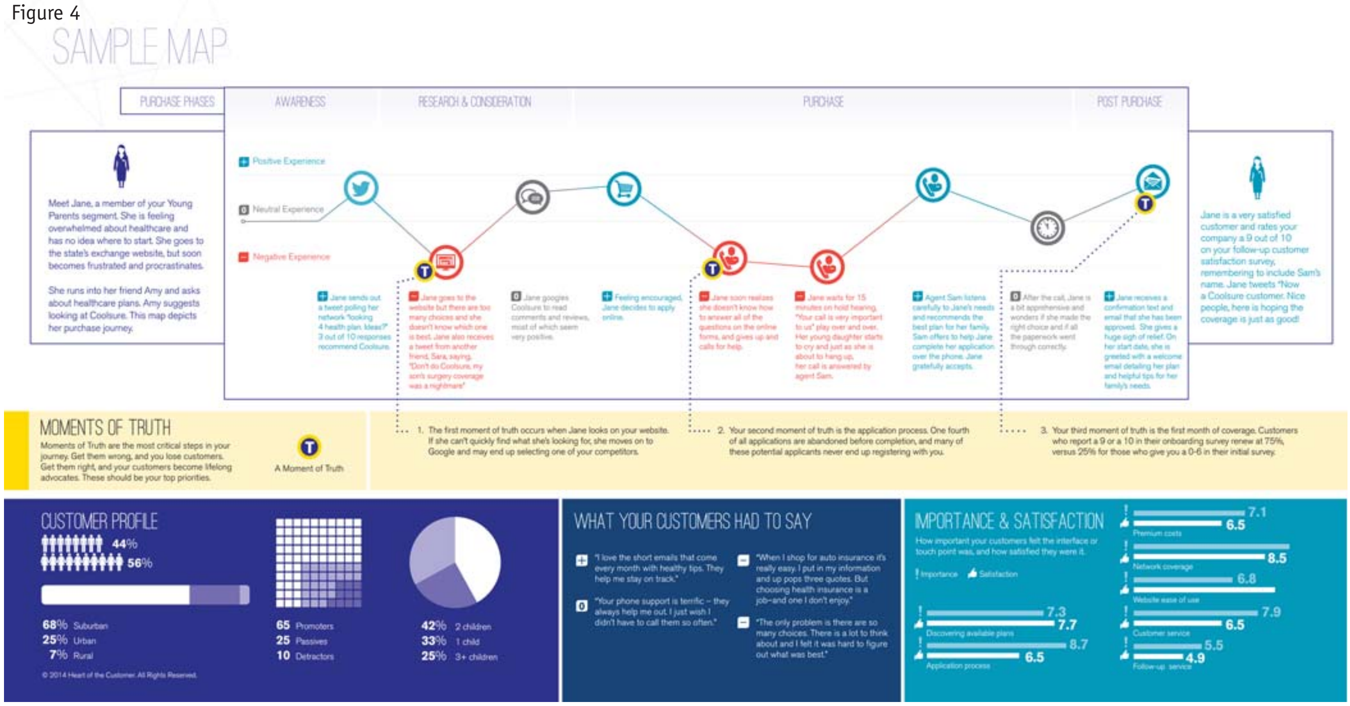
One common approach is to start with the high-level, end-to-end journey map. This will show where your customers experience the greatest friction. From here, you can launch separate projects to map these more challenging sub-journeys. But there are also other ways to find your most important journeys.

Existing research such as satisfaction surveys often highlight journeys that need attention. For example, a B2B software client received markedly low scores on invoicing, making it an ideal topic for a journey-mapping project.

Business metrics are also useful. A different B2B software company found that the number of incoming leads was much lower than it expected. The firm commissioned us to map the pre-sales journey to better understand how prospects search for information on products and services, including with our client's competitors.

Business changes often lead to a need to better understand the existing experience. With the advent of the Affordable Care Act, a health insurance

Figure 4



company commissioned us to help it better understand how individuals shop for health insurance.

2. Focus on personas. Any existing customer personas or segments are critical inputs to the journey-mapping project. Different types of customers have different journeys and segmentation research is a key input. In the health insurance example above, we researched how the firm's four most important customer segments shop differently. (See sidebar.)

If personas do not exist, create them as part of the research. We create separate journey maps for each persona, showing clear differences in engagement and often different touchpoints used by each.

For a nonprofit client, we used focus groups to meet with a broad variety of members, developing three personas in the process. Each had a dramatically different journey and the personas helped employees better internalize the results. These personas also play a central role in their ongoing member experience strategy.

Contrast the maps in Figure 2 and Figure 3 with the map for Passive Pat. You'll notice that Motivated Molly is the ideal patient. While she has her challenges, Molly is motivated throughout the journey, taking full advantage of her doctor's advice, whereas Discouraged Debbie eventually drops out. Passive Pat is in the middle; he can be motivated if sufficiently encouraged, but also is at real risk for quitting. Each persona reflects a type of customer whom employees immediately recognize, helping them to apply the learning.

3. Conduct the qualitative research. Include both high- and low-engagement customers to see if their experiences differ. For the nonprofit client mentioned above, we included a screener question asking members about their commitment level. For the health insurance company, we included both its customers and those who use competitors. When studying property and casualty insurance agents, we included both those who write a lot of business with our client and those who rarely do. We often find great differences between the groups, which directly impacts our mapping results.

4. Use a designer. A Google search on journey maps will show a wide variety of designs. While many are linear, some are circular. Some show a Post-it Note-style layout while others use illustrations. There are best practices for what constitutes an effective journey map. Our white paper provides more details.[5]

We use professional designers for our maps. We find that their clean design makes the maps easier for viewers to understand and also makes repurposing the maps easier. We incorporate our clients' brand guidelines to create the final look. See Figure 4 for a different take on a journey-map design. This was designed as a three-foot fold-out map that employees could carry with them.

5. Run an ecosystem-mapping workshop. Ecosystem-mapping workshops add customer-facing employees and systems as well as backstage activities, employees and systems. We use the steps, touchpoints and emotions from the research-based journey map and then ask employees to document the rest of the customer ecosystem, basing each component on what the customer is doing at that time.

These workshops have several benefits:

- They help employees better internalize the research by relating their world to what customers reported.
- The workshop creates rich dialogue between employee silos, the inhabitants of which often do not regularly interact. There is a real danger of finger-pointing, so effective facilitation is crucial.
- Friction points are often caused by back-end activities earlier in the journey. By building the complete customer ecosystem, we see how back-end activities relate to customer moments of truth.

6. Run action-planning. The journey-mapping process never fails to show both quick wins and areas that

Case study: Uncovering the health care purchase journey

With the advent of the Affordable Care Act, a client asked us to research how its existing segments purchase health care. The organization was particularly interested in four of its seven segments, varying from young and healthy participants to the retired.

In-depth interviews were held with 10 customers and 10 non-customers of each segment. The specific findings are not shareable but general themes are.

The journey varied significantly between segments. One segment used only four steps to research and purchase health insurance over a few days. Another used more than a dozen steps, including the Web site, call center, brokers and retail locations, taking up to two months to make the decision. A third segment focused extensively on pharmaceuticals, to the point where segment members regularly used the term "formulary" without effort.

The journey maps helped our client understand the futility of treating all customers the same. Instead, our client learned how segment members used the same Web site or call centers very differently and was thus able to build better experiences for its customers around their true needs.

Most importantly, **by analyzing each segment separately, our client discovered why it was having problems selling to one segment**. These members needed a more personal experience, as they were using the Web site only to look up a phone number or ask for a brochure. As a result of their journey map, our client was able to improve this segment's journey and eventually sold to more of these customers.

require longer-term investment. Once they have time to internalize the journey maps, employees come to action-planning filled with ideas. The process ends with a complete customer-focused plan to remove friction from an experience to create long-term loyalty.

Prioritize opportunities

The journey-mapping process itself does not offer direct return on investment but the projects it inspires always pay for the research. By demonstrating how your customers view their experience with you today, your journey maps help you prioritize opportunities.

Companies use journey maps in a number of ways, including:

Discovering the barriers to loyalty. Many journey maps are commissioned to help build a more loyal customer base. The journey maps for a nonprofit client showed how one persona yearned for a more personal connection. Without this, they drifted away over time.

Uncovering the current prospect research process. Another common practice is to use journey maps to understand the current sales journey. A CEB study revealed that 57 percent of a typical B2B purchase decision is made before a customer even talks to a supplier.[6] Journey maps show how the sales process unfolds. See the sidebar for an example of a consumer sales journey.

Prioritizing investment. When creating a journey map for a distributor, their team was divided on whether to focus resources on a new Web site or reinvest in the sales channel. When we mapped both the distributor's existing sales journey and that of competitors, it quickly became clear that customers did not frequently use distributor Web sites but instead relied on their relationships with the field sales channel. This provided the clarity needed to build a new sales plan.

Initiating design. Journey-mapping naturally leads to designing a new experience. Journey maps show current need states, especially when competitor journeys are included.

Training staff. Journey maps can create wide-scale impact when used to help develop training programs. Their visual nature clearly communicates customer needs and emotions, helping build employee-customer empathy.

Changing the culture. Journey maps can play a central role in cultural transformation, showing both the current state and where changes need to be made to improve the customer experience.

While they look different, journey maps rely on the same core skills as other impactful research projects. By effectively showcasing customer relationships and their moments of truth, journey maps can become central to any customer experience program and deserve a place on your wall.

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••• customer experience research

We can work it out

Closing the MR-CX gap with a five-P framework

| By Sheryl Hawkes and Yvonne Nomizu

snapshot

The authors outline a common platform for design, administration and analysis to help researchers and customer experience professionals work together to gather insights.

For many years now, marketing research and customer experience research have been siloed within organizations, despite considerable overlap in function and motivation. This conundrum was aptly described by Eric Whipkey in a *Quirk's* article in November 2014, where he said: "I cannot think of two other industries that seem to be engaged in the same work but getting to such different/more defined objectives."

Customer experience professionals (CXers) aim to close the loop with the customer insights they gather. The data is collected and analyzed for key insights and socialized internally in order to motivate and drive customer experience improvement efforts across the organization. Marketing researchers, on the other hand, are primarily "statistically-driven insight deliverers" and are often frustrated when comprehensive analysis and reports are just shelved. Seeing CXers doing with their data "what every market researcher hopes their clients will do with their research" (Whipkey) is appealing, provocative and

exciting for any researcher.

On the flip side, CX research tends towards being highly qualitative. Driven by the do-it-yourself survey industry, Net Promoter Score and the need for speed, CX voice-of-the-customer research can lack some of the rigor, quality and statistical significance that a properly-planned and -executed marketing research project can deliver. CX research aims to truly understand the customer, not just quantify them. All of this feels a little "soft" for your hardcore marketing researcher and can set off alarm bells for strategic and financial decision-makers. So there is a clear need for CX researchers to "quantify the qualitative."

Meanwhile, both marketing and CX research can be skewed by the methods used to gather and analyze the data. CRM-based behavioral data can take weeks to analyze, while customer opinions can shift in the time it takes one negative video to circulate online – one of the reasons that research often ends up as "doorstops" (Whipkey). Moreover, traditional customer satisfaction and loyalty research is usually based on customer recall after a purchase or experience, which can be far different than the customer's real motivations or feelings.

The near ubiquity of mobile devices and the applications that make them useful for everything – communicating, shopping, entertainment and personal productivity management – make them ideal platforms for in-the-moment customer experience research. Mobile devices and social applications let researchers watch and communicate with customers while they interact with brands, making observations far more accurate. This will in turn allow marketers and CX professionals to determine and respond to trends much more quickly than traditional research approaches allow.

Access to the vision and voice-of-the-customer in his or her own words, unfiltered and unmoderated, can provide richer, more reliable data than post-purchase surveys and focus groups. As new "always-on" technologies, such as wearable devices (Fitbit, GoPro) are adopted, and the connected Internet of Things (behavior-monitoring automobiles, household appliances, etc.) becomes a reality, new sources of personalized, passively-collected behavioral data will also be available to augment in-the-moment customer experience research.

Though the authors come from different backgrounds (one's a CXer who uses MR and the other is a researcher who does CX research), we both feel compelled to pose a vision for how CX research could draw on the strengths of marketing research, and in turn, how marketing research could better support the burgeoning CX agenda. Both disciplines could benefit from cooperation and less division. This article presents our framework to support such a synergistic relationship. We believe we can leverage emerging marketing research technologies to create better research designs that both quantify and qualify customer experiences.

Accustomed to immediate gratification

We work in a marketplace that has become accustomed to immediate gratification. People want to shop in seconds, get products delivered the same day and many won't wait for a slow Web page to load, let alone wait through multiple telephone survey questions. Data collection must keep up.

In-the-moment research is becoming common in the user-testing industry, with significant growth in the past few years (Rotolo). Location-based research is also growing, allowing for truly in-the-moment feedback that can enhance research focused around events, travel and retail (Welch). Most mobile applications now ask for permission to use the device owner's location. This opens new avenues of collaboration with consumers who can, through their mobile devices, share experiences and opinions, not just when they receive survey invitations, but on the go, anytime, anywhere (Rocha).

Instant messaging is another way that modern consumers are personally connecting in-the-moment. According to Mary Meeker, the Internet Trend guru, six or more of the top 10 applications used globally are used for instant messaging. For researchers, instant messaging lets us receive photos and videos from our respondents as we hold a conversation with them about their customer experience – as it happens.

Video capabilities on smartphones give new meaning to face-to-face research. Video can act as the researcher's window to consumer reality, capturing precise detail at the time it matters the most, recording a truthful depiction of their thoughts in the moment. By appending video data with tracking and survey data, researchers can generate a reliable, true path to customer purchase journeys (Kuegler). This capability is here now and it works. VoxPopMe's short-format open video responses, integrated into short, mobile surveys, have been shown to provide six times more content than open-end text responses captured through traditional online surveys.

An interesting trend in marketing is that push notifications are being more widely adopted by consumers in search of special and exclusive deals from their favorite brands. Almost six in 10 adults have downloaded applications from their favorite brands and of those who have downloaded these applications, seven in 10 have enabled push notifications. Marketers witness 50 percent or higher open rates on push notifications versus e-mail, with click-through rates up to twice as high as well (Clifford). Researchers should sit up and take notice: Push notifications containing survey links with attractive incentives have the capacity to drive up response rates and engage the brand's customers with in-the-moment research activities.

Clearly, mobile technology is already becoming a game-changer for researchers. The technology exists right now to capture customer sentiment and behavior while it is happening. We believe CX and MR can mutually benefit from leveraging current and emerging technologies to understand the mind of the customer – concurrently, in both a qualitative and a quantitative sense – and in the moments when they interact with the brand.

Use research strategically

Customer experience leadership is growing, with an increasing number of chief customer experience officers who look to use research strategically for customer loyalty and competitive advantage. As the CX discipline matures, customer experience professionals talk increasingly about ensuring the business case for improvement investments, about determining the ROI and about justifying an overhaul of company culture to optimize the customer experience. This is where the need for quantitative research will not be supplanted by qualitative approaches, but will, in fact, become more important. As management guru Peter Drucker famously said, "What gets measured gets managed." Customer experience is no different.

Quantitative research with larger, more representative sample sizes can bolster confidence in qualitative insights and capture experience metrics such as satisfaction or sentiment for specific journey stages and at specific touchpoints. By integrating quantitative customer experience metrics into customer journey maps, CX professionals gain a useful tool to diagnose the start-to-finish customer experience. The same quantitative measures can be captured after an improvement project to measure the impact of the change.

What is a practical way to take advantage of the new technologies and the bent towards faster, in-the-moment research, while not giving up on quantitative results which the C-suite will continue to demand? As we thought about *what* has changed, we thought about *how* to change. Thus we have developed a new framework for customer experience researchers and marketing researchers to consider when pursuing insightful, accurate, fast and statistically valid insights to support the ultimate goal of moving forward with CX designs and solutions. Importantly, the first step is an overall mental model – researchers must ignore the traditional labels of quantitative versus qualitative and not first think about modalities (phone versus IVR versus online) but be device-agnostic. Instead, it starts with the researcher thinking customer first and then leveraging different methods to get as close to the customer as possible.

Marketers have been trained to use a "five-P" model for marketing strategy. Here, we offer five Ps to consider when designing hybrid quant-qual research for CX purposes.

1. Place – where the customer is pre-, during and post-purchase. Customer experience is about the complete journey a customer goes through in achieving his or her goal. It starts at the moment the customer has a thought about a need and ends when fully using a product or service – and presumably fulfilling the original need. Place is about asking where the customer is prior to their interaction with the company, at the moment they are purchasing or inquiring, through use and on to being fully supported. Where are they in these pre-, during- and post-purchase moments? What are the best means for reaching them? Sometimes researchers are better served by capturing opinions away from respondents' homes and computers and in the moment when those opinions are formed. Examples might be when a consumer is at a store shelf considering which product to purchase, in an automotive showroom viewing new vehicles or in a restaurant enjoying a meal.

2. Prompt – how the customer is contacted. With traditional methods, a customer might receive an e-mail invitation to participate in a survey. With this new paradigm the researcher should think about alternative ways to prompt the feedback. Is a text message while in the middle of the experience a better way to solicit information? Can Instagram be used to send a photograph with questions or to request a photograph and comments? Technology enables immediate pushing and pulling of questions and not just one-time e-mails with hyperlinks. Participants who have opted into receiving push notifications might receive a message that opens a survey. Schendel et al. have shown that push surveys are typically opened closer to the target send time and therefore provide a better way of capturing respondents in-the-moment.

3. Participation – the voice and view of the customer. Participation is qualitative data capture consisting of an in-the-moment or close-to-the moment text, image, video or audio component where customers can share what they think and see. For now, this is likely to be achieved with smartphones using a supporting platform such as that offered by VoxPopMe. However, in three to five years we could be utilizing Google Glasses, Apple watches or some other wearable video-capture devices that have the added bonus of being hands-free for a more efficient, less intrusive data capture experience.

4. Polling – quantifying the experience. Polling refers to the quantitative portion of the research, but not in the traditional "long, online survey" sense. Polling is designed to be mobile, with brief sets of questions that can be rapidly answered with minimal intrusion on the moment. The obvious challenge is how to reach enough people and ask enough questions so there is a large enough dataset to conduct proper statistical analysis. Again, wearable devices or clothing could play a key role, by serving up extremely short, experience-related surveys, perhaps through audio questioning and response, a la *Star Trek*.

5. Prioritization – analysis and conclusions portion of the research. The key purpose of conducting any customer experience research is to determine what is going to be most impactful for improving the customer experience and what, among all the opportunity areas, should be prioritized. The improvement efforts should be prioritized for addressing underperforming programs and loyalty-driving elements of the customer's experience based on their relevance to strategic target customers and the ease and/or cost to implement the needed changes. Key to this stage is the appropriate collection or capture of qualitative and quantitative data through the four prior Ps, followed by analysis of the data using a combination of standard and advanced statistical techniques, text and image analysis, facial coding and emotional analysis.

Case study

Let's look at how this new framework might play out for a real CX research project.

A large, fast-growing regional brick-and-mortar bank identified a disparity in the account closure rate across its branches, with some branches having a significantly higher rate of closures than other branches. After talking with branch employees, the bank hypothesized that it might be delivering inconsistent customer service, causing high levels of dissatisfaction among customers at some branches. It wanted to be able to see and hear what its customers had to say about the branch experience as it occurred for them, as well as provide a clear course of remedial action to the bank's C-level executives.

On the advice of its customer experience consultant, it turned to the five-Ps approach to design its research project. It wanted to engage customers in the research as they entered the branch (place). In order to do this, customers identified as regular branch visitors were e-mailed an invitation to participate in the research project. The incentive was a chance to win $1,000. Participants were asked to download a mobile app for the project. Then when these customers approached a geofenced branch location, they received a push notification reminder to participate in the research (prompt).

The customers who opened the app on their smartphones were then presented with a short survey that asked them (participation and polling):

- What was their reason for visiting the branch at that time? (For needs-based segmentation analysis.)
- How likely were they to remain a customer of this bank? (For loyalty driver analysis and benchmarking.)
- To take a photo of themselves. (For demographics and persona development.)

Customers were then asked to enter the branch and to capture photos of anything they felt positively or negatively impacted their visit (participation). As they left the branch and returned to their vehicle, they received another push notification (prompt) to complete the research task. When they opened the application, they were presented with a short survey (polling) asking them to:

- Rate the experience they had at the branch (for correlation with loyalty).
- Upload any photos they took (to provide context and reality to the numbers).
- Record a 60-second video segment explaining how they felt about the visit and why they gave that rating (to capture emotion, feeling and voice of the customer).

After data collection, the CX researcher used a customer-needs based segmentation to analyze the quantitative data (experience and loyalty ratings, demographics) and the qualitative data (text, image and emotional analysis) for each branch. Very quickly the researcher was able to give the bank a prioritized listing of the most significant and impactful pain points of the branch experience along with an edited reel of video segments from customers that supported the priority recommendations (prioritization).

Assemble whole solutions

Neither qualitative nor quantitative research alone gives the CX professional a complete picture of the customer experience. Quantitative research provides the critical numeric guidance to support decision-making but lacks the ability to truly get inside a customer's head and heart, the way qualitative research can. At the same time, traditional marketing research methods (both quant and qual) are inadequate for measuring customer experiences because they are never close enough to "the moment," they can be too intrusive and the traditional time frame to execute on a project is too long, such that the recommendations are already outdated by the time they are examined. The solution is just about at hand – various tools are available, the CX inquiry is clear. Now, it is up to marketing researchers to assemble whole solutions and to partner with CX professionals to produce deep and actionable insights. With our five-Ps framework, we hope to begin to close the chapter on the MR-CX divide and provide a common platform for design, administration and analysis going forward.

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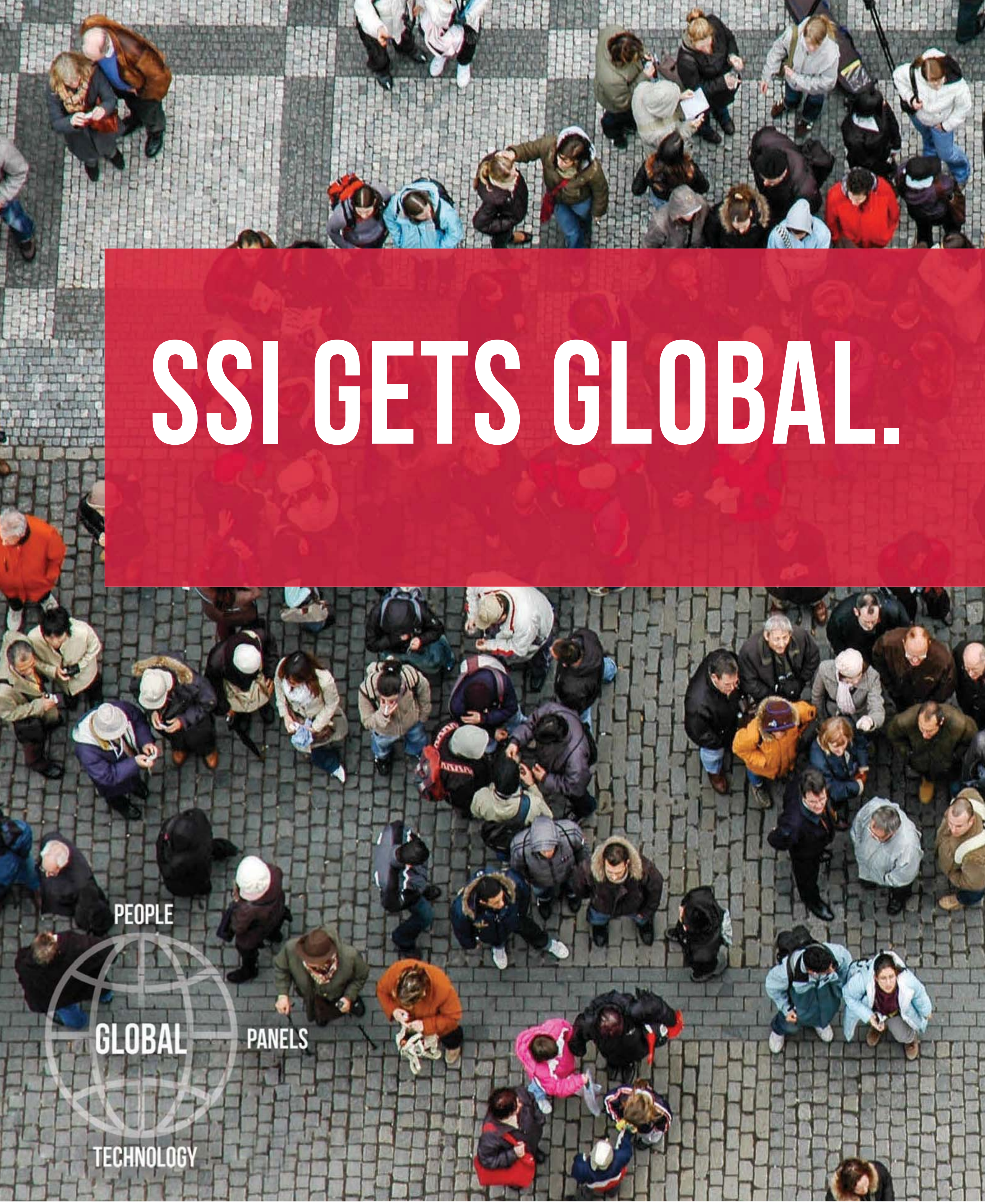

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customer experience research

Forget 'omni.' Just help me.

A focused approach to optimizing omnichannel service

| By Cynthia J. Grimm

snapshot

Omnichannel customer service is a laudable goal but the author argues that it's better to understand customers' needs and focus on steering them to the solution that's best for them.

While contact channels abound and companies tout their omnichannel service, research conducted by our firm, CX Act, with both customers and companies finds that companies are not as "omni" as they think they are – and customers don't really care.

This "everything to everyone" approach does not really drive higher customer satisfaction and loyalty and, in fact, could be leading to decreases of both. While there are good financial reasons for a company to provide omnichannel service, implementing this service in a way that doesn't meet customers' needs does far more harm than good.

A more rational approach lies in focusing on the end-to-end customer experience and tasks across that experience, optimizing contact channels (single- or omnichannel) that will best meet that need and then steering the customer to the best solution.

At the end of the day, customers want their customer service question or complaint resolved quickly and easily in the first contact. Our research shows that customers who receive a first-contact resolution (FCR) during their customer care interactions, regardless of channel of contact, are nearly twice as likely to remain loyal and four times more likely to spread positive word of mouth about a company (Figure 1).

Increased FCR also has a direct impact on reducing company handling costs, so anything a company can do to increase the likelihood of first-contact resolution goes straight to the bottom line.

The majority of company respondents to the CX Act research (more than 60 percent) said their company is not capable of handling customer issues in one contact via non-telephone channels – such as self-service, e-mail, live chat, social media and mobile. Most inquiries through these channels involve at least a second contact, in which the customer is sent to the (more expensive for the company) telephone channel for resolution.

Customers seem to know this, as less than 60 percent said they expect their issue to be resolved in one contact when contacting via self-service, mobile or social media.

quirks.com/articles/2015/20151008.aspx

Figure 1

Companies and customers also agree that telephone (also the most mature of the contact channels) is the one channel with a high confidence of resolution in one contact.

Our research shows that 75 percent of customers use traditional contact channels (primarily telephone) as the first channel of contact when they have a question, complaint or to conduct a routine service transaction, with little difference by age. While younger customers may be more willing to try alternative channels, they tend to hold back when contacting with questions and complaints, with the expectation that traditional channels are more likely to result in quick resolution.

When employees were asked if their company makes it easy to handle customers' issues via various channels, and customers were asked about their expectations for each channel's ease of use, telephone was the only channel cited as meeting or exceeding customer expectations. Channels with the greatest opportunity (largest considered future use and lowest performance) were mobile, self-service on Web and e-mail.

A channel of choice

So, what channels do customers want? While traditional care (especially phone) will continue to be a channel of choice, when asked which channels they will consider using in the future, three times more said they would consider self-service online and 10 times more said they would consider using a mobile channel, with younger customers more likely than older customers to consider using non-telephone channels.

Customers tend to make their choice of channel based on the perception of which channel will best meet their needs for a specific task. Research by the Corporate Executive Board[1] found that most customers (84 percent) are "ends-focused" (focused on satisfactory resolution of their issue, regardless of channel used) and only 16 percent are "means-focused" (wedded to a certain channel of preference, regardless of their sense of its fitness to the task).

Our research puts a finer point on this, showing that the most important factors driving customer selec-

Figure 2

1. **Understand** customer end-to-end experience (journey) and needs by touchpoint (point of interaction) among most important segments
2. **Evaluate** your company's capabilities and operational constraints across channels/touchpoints
3. **Prioritize** development of channels that will best serve your customers for key touchpoints and segments
4. **Establish and meet service levels** for each channel that meets customer expectations
5. **Communicate, educate** and **direct** customers to the channel that will most meet their needs by task

tion of a given contact channel are:

- First, the degree to which they believe accessing the channel will be "quick and easy."
- Second, their level of expectation that, in this channel, their question/complaint/transaction will be resolved in the first contact.
- Third, when the reason for contact is a complaint or a question, customers desire "human contact."

If the reason for contact involves a sensitive (e.g., billing-related) transaction, customers value "security" more and tend to gravitate toward a self-service-on-the-Web channel.

The lesson here is that customers do not care about the extent of a company's "omni-ness." They care about the quality of service. More to the point, it's better not to be in a channel at all if you're going to do it badly.

Two essentials

Returning to the key elements of what makes a great interaction, it all comes down to two essentials: first-contact resolution and making it quick and easy for the customer. Our data goes one level deeper to identify three key drivers of FCR and what "quick and easy" means: personal details available; previous interactions available; and personalized solutions.

When the interaction is via telephone, a fourth key driver enters the picture: "warm and friendly experience."

These key drivers can create a perception of "quick and easy" even when crossing channels. For example, in a recent interaction with a major airline, the author attempted to make a reservation online and then called the airline. The automated system recognized me from my phone number, verified my identity and then said "Are you calling about the reservation you were attempting to make today online to Omaha?" This seamless integration of personal information and knowledge of interactions in another channel dramatically increased the ease of getting my issue resolved and had a feel of being one continuous contact.

Not easy

Of course, the actual implementation of this level of integration is not easy, given the myriad legacy and siloed systems that most organizations operate. In fact, "technology constraints" and "more pressing priorities" were the two biggest barriers to omnichannel customer care that companies reported in surveys.

Companies face the ultimate challenge of when and how to shift both emphasis and dollars from high-cost/high-value channels (such as telephone) to lower-cost, non-traditional channels in the face of failed or stalled attempts and customer reluctance to trust the new channels to meet their needs. While omnichannel customer service holds great promise for cost reduction, current attempts to be "everything, all the time, everywhere" often result in duplication of costs rather than achieving operational efficiency.

So, how can companies achieve the balance between offering new channels and meeting customer expectations? The answer is focus – focus on understanding the customer's end-to-end experience and needs, focus on understanding company capabilities, focus and prioritize channel development and focus customers toward the channels that will most meet their needs for the specific reason for contact.

The suggested methodology, pictured in Figure 2, provides a guide for companies to optimize their omnichannel customer care experience.

It begins with an "outside-in" understanding of the end-to-end customer journey and key touchpoints/interactions of the most important customer segments. This often starts with an internal cross-functional group outlining a customer journey map but needs to be supported by robust customer research to validate and quantify the key moments of truth and the points of pain.

The second step is to evaluate the company's capabilities to meet customer expectations for the touchpoints that are moments of truth through the various channels and assess the challenges and barriers to meeting those expectations.

The third step is the most important and maybe the hardest. This is where difficult decisions need to be made on what channels should be offered and how they will be developed, supported and integrated.

Critically, not all channels are appropriate and it is better for a company to decide not to offer a channel than to do a poor job of delivering within that channel. For example, Netflix is a company that has taken a more focused approach. It has decided that it cannot adequately provide a quick and easy resolution on first contact via e-mail, so it does not offer e-mail as a channel. Instead, it has developed a robust self-service help center online, with easy access to a live person via either chat or phone. The help page transparently displays the current availability and wait time for chat and phone, so that the customer can choose the faster of the two if they have no preference otherwise. It also generates a code that is entered prior to being connected to the customer service agent, so that Netflix will be able to easily access the customer's personal information for a seamless one-contact resolution.

The data collected in steps one and two allow the company to quantify the economic impact of not meeting customer expectations, versus the cost of developing alternative channels or channel integration.

The fourth step, establishing and meeting service levels, is all about making sure any channel offered delivers on the promise of good service.

The fifth and final step is communicating with customers to educate them on the most appropriate channel, by task, to meet their needs. For example, simple questions can often be easily and quickly resolved with self-service, supplemented with the possibility of a chat agent. For complaints, it is better to immediately get the customer to a live agent for a quick resolution with a human touch.

Exact opposite

Simply put, trying to be all things to all customers may seem like a customer-focused approach but for most companies it is the exact opposite. The best way to meet customer needs is to resolve customer questions, complaints and transactions quickly, easily and in one contact (or what feels like one contact).

That doesn't mean omnichannel should be ignored. It is something customers, especially younger ones, value, as long as they can successfully gain resolution. And the key word here is "successfully." Moving some interactions away from the more expensive telephone channel to less-costly alternative channels can benefit the company's bottom line – again, as long as interactions are "successfully" handled in the first contact.

The key to all of this is to adopt a focused and systematic process that incorporates the customer's view across the end-to-end experience and a realistic assessment of corporate priorities. This five-step process is a good starting point to achieve success.

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customer experience research

Making sense of the white noise

Analyzing multiple customer VoC streams requires multiple solutions

| By Rick Kieser

snapshot

The author argues for a multi-technology text analytics approach to processing the many forms of customer feedback that organizations have available to them.

Voice of the customer (VoC) and customer experience management (CX or CEM) programs are critical keys to gaining and sustaining customer engagement and loyalty. There is no shortage of data available to analyze – customers are talking more than ever and the market research industry is rich with ways to listen, collect and understand what they are saying. With the technologies and providers currently available, companies can transform disparate feedback channels for customer comments – both solicited and unsolicited – into timely, actionable insights.

There are growing numbers of players investing in rules-based text analytics and combining them with survey technologies to create "platform solutions" with promises of one-stop-shopping for collection, analysis and application together with cost savings. There may be benefits but there are also important and sometimes obscure trade-offs. Fulfillment of the platform promise is deceptively difficult. Locking in to a singular text analytics technology requires the company to conform to it, rather than applying the right point solution at the right time customized to the company's situation and data. There are important considerations and options that should stay on the radar for optimal efficiency and effectiveness.

Just as CX/CEM software has reached a level of maturity, so too has software for text analytics, mostly based on an underlying set of techniques termed natural language processing (NLP). The predominance of this method in commercial software risks overshadowing two complementary text processing methods, which are equally relevant and in some instances are more appropriate in handling very large volumes of feedback data. One is machine learning, an artificial-intelligence approach that learns how to categorize and interpret text from samples previously coded. The other is semi-automated coding, an auto-assisted method that organizes the work intelligently and optimizes human decision-making. (See my article "Navigating the new data streams" in the January 2014 issue of *Quirk's* for more on NLP, machine learning and semi-automated coding.)

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In a presentation given at the Orlando Confirmit Community Conference in May 2014, Gartner's Jim Davies estimated as many as 290 providers in the CEM space, with a handful claiming they can do it all, but warned that in CEM, no one solution can do it all.

Set against the backdrop of different – and often disjointed – customer insight initiatives and customer feedback channels, companies can now start to build highly effective technological solutions to integrate feedback, provided they fully evaluate their internal needs and do not settle for suboptimal or limiting technological solutions. With an integrated point-solution approach, the results can be very valuable and a full payback should be expected within a single fiscal cycle, not to mention the long-term upside, demonstrated in detail in this article.

Flexibility is lost

In an emerging world of one-stop-shop platforms, it's tempting to default to solutions rooted in the traditional core of survey administration and the lure of basic low-cost-per-comment text analytics. There are certainly scenarios in which the selected methodology built into a given platform will be optimal at a given point in time. But there's a flip side – often what's lost is flexibility to mesh with existing processes or to grow with the organization, so ultimately what originally appeared to be a convenient or cost-saving solution is only truly efficient in a narrow or limited context. To evaluate your specific situation, consider a very specific set of criteria with four critical components: volume, complexity, cost and maturity.

Figure 1

Semi-Automated Classification – Year Three

	Low	Medium	High	Very High
Simple	$9,000	$90,000	$450,000	$900,000
Intermediate	$9,000	$90,000	$450,000	$900,000
Advanced	$9,000	$90,000	$450,000	$900,000

Formula = Setup Cost + Years x Processing Cost (Response Volume x Cost/Comment)
0 + 3 x (100,000 x .3)

Machine Learning Classification – Year Three

	Low	Medium	High	Very High
Simple	$9,500	$50,000	$230,000	$455,000
Intermediate	$29,500	$70,000	$250,000	$475,000
Advanced	$104,500	$145,000	$325,000	$550,000

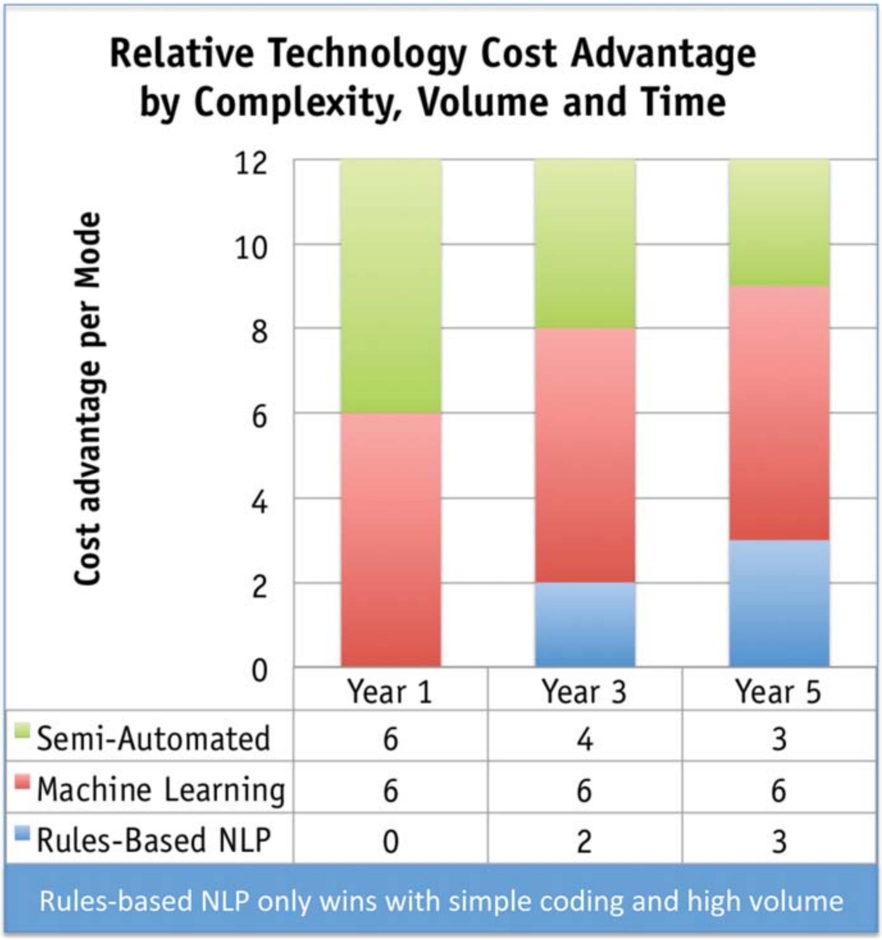
Formula = Setup Cost (Hours/Code x Code Complexity x Cost/Hour) + Years x Processing Cost (Response Volume x Cost/Comment)
(2 x 250 x $50) + 3 x (500,000 x .15)

Text Analytics Classification – Year Three

	Low	Medium	High	Very High
Simple	$66,500	$92,500	$212,500	$362,500
Intermediate	$316,500	$342,500	$462,500	$612,500
Advanced	$1,253,000	$1,280,000	$1,400,000	$1,550,000

Formula = Setup Cost (Hours/Code x Code Complexity x Cost/Hour) + Processing Cost (Years x Response Volume x Cost/Comment)
(10 x 50 x $125) + 3 x (1,000,000 x .10)

Figure 2



First, examine the volume of comments you are (or expect to begin) receiving. Volume drives productivity of both human involvement and technology and therefore it is a significant cost driver. To create representative scenarios, we use a four-tiered scale of low, medium, high and very high volume, using the following threshold markers:

- Low: 10,000 customer responses per year
- Medium: 100,000 customer responses per year
- High: 500,000 customer responses per year
- Very high: 1,000,000 customer responses per year

Next we look at complexity based on codebooks (classification hierarchy of customer comments, often referred to as classifiers, taxonomies or codes) on a scale of simple to advanced. Coding is the underpinning of customer experience insights, because it enables insight generation from classified customer responses. For automated technologies, the codebook complexity will determine how much it costs and how long it takes to get a solution to be operational. Thus, complexity drives quality of results along with productivity and accuracy of cost assumptions. For scenario analysis, we classify complexity as follows:

- Simple: 50 classifiers/codes
- Intermediate: 250 classifiers/codes
- Advanced: 1,000 classifiers/codes

Finally, we must make cost assumptions. Notice the bottom line: the very low cost per response with rules-based

Figure 3.1

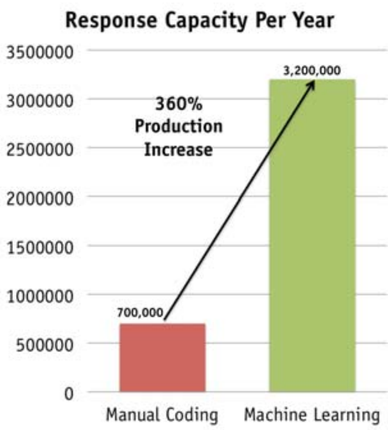


Figure 3.2

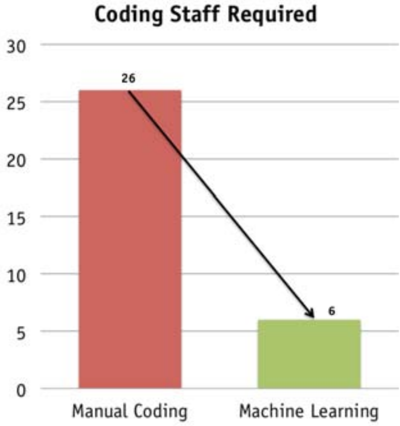
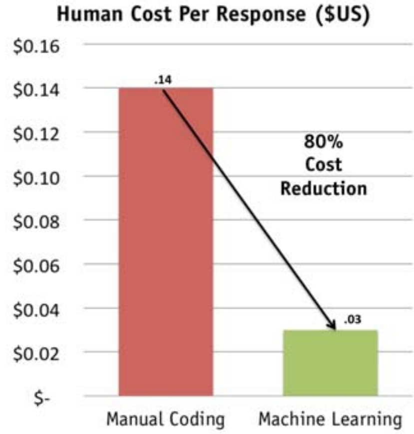


Figure 3.3



NLP is at the root of many poor decisions. NLP is most susceptible to complexity, given the rules-based approach and the expense of tuning the solution to make it operational. We use the following industry standards in our assumption model:

- Semi-automated: 30 cents per response
- Machine learning: $50 per hour for tuning; two hours of customization per code; 15 cents per response
- Rules-based NLP: $125 per hour for tuning; 10 hours of customization per code; 10 cents per response

To complete the comparison and evaluation, we look at maturity, the intersection of volume, complexity and cost over time. As the intersection shifts, the optimal technology solution may change over time as well.

Select a set of time horizons; we used one, three and five years. For each horizon, compare the three potential technology solutions from a cost perspective in a set of 3x4 grids based on the above categories of complexity and volume. See Figure 1, in which the green highlighting shows which combinations the selected solution would "win" from a cost perspective (calculated using the cost assumptions outlined above).

The grid shows relative cost advantage for each technology solution for each volume/complexity combination in year three. So, if the company

Figure 4

Overall Sentiment*		1.30	
Sentiment Group	Sentiment	Variance to Total Company	%
Service	1.51	0.00	
Other glass/products	0.74	0.26	
Safelite	1.53	0.36	
Experience	1.61	0.20	
Results	0.74	0.08	
Quality	141	0.12	
Work	1.44	0.07	
Process	1.26	0.06	
Perception of Employees	1.45	0.02	
Installation/Repair Job	1.64	0.01	

receives a high or very high volume of simple customer comments per year, the optimal year-three technology from a cost perspective would be rules-based text analytics. But other volume/complexity combinations would favor either semi-automated or machine-learning technologies from a cost perspective at that point.

In Figure 2, we summarize the above analysis by "scoring" the winning technology in each combination for each time horizon. So in year three, semi-automated "wins" in six of the 12 volume/complexity combinations, and so on. Layering on the one- and five-year analysis, we see that NLP text analytics alone only ever "wins" versus semi-automated classification or machine learning solutions at high and very high volumes of comments, and even then only with simple coding scenarios. Machine learning becomes very attractive in three-plus-year projections, while semi-automated becomes relatively less cost-efficient after the first year for most scenarios.

Of course, each different organization will have a unique set of circumstances to evaluate and accommodate. The above analysis clearly shows the risk associated with locking in to a single classification technology platform, as well as the opportunity associated with a more fluid set of options. Following are three case studies to further demonstrate the nuance of the risks and opportunities.

Longer to obtain

On top of the lack of adaptability over time as costs and benefits shift, and the tricky nuances of various comment volume/complexity scenarios, what the single-classification technology platform provider probably won't cover is the time and cost involved in initial set-up and code-tuning. Without that, quality and productivity suffer, but with it, costs quickly outweigh benefits in many scenarios. Either way, your ROI takes much longer to attain or might never materialize as promised.

"Beware of claims advertising 'the best text analytics tool' as, in reality, the best text analytics tool will vary from organization to organization. Because these tools process your specific unstructured data, do not select a tool without first testing it with your data," warns industry sage Bruce Temkin. ("Text analytics reshapes VoC programs," page 13, May 2014)

To illustrate both the issue and the opportunity of shining the light on the key hidden costs, consider an eye-opening case. A $40-billion global entertainment company with a daunting task of categorizing 3.2 million verbatim comments per year invested in a classic rules-based text analytics solution. With the promise of automation and a goal of reducing operating costs, the firm cut its staff from 26 to six based on the projected capabilities of the software. After two years, the initiative was not successful: The company was left with a reduced coding staff able to process only 700,000 responses a year, when the company needed to handle five times that amount, not to mention lack of detail or precision necessary to fully pull meaning from the comments.

Scenario analysis up front and broader technology options could have saved both time and money. Hindsight clearly reveals that in this case, automated text analytics alone was not the answer. The real solution was a combination of semi-automated and machine learning, in essence, a facilitated manual start with an automated finish. In this example, the program imitated manual coding at the rate of tens of thousands of comments per hour through a learning metaphor – basically learning by example. Productivity improved by nearly 400 percent and human costs were reduced by 80 percent with accuracy scores between 85-95 percent (see Figures 3a, b, c).

'Complete paradigm shift'

Further illuminating the limitations of a one-dimensional platform approach versus the possibilities of a multi-dimensional approach, Safelite AutoGlass has driven "a complete paradigm shift" in the company's decision-making with the portfolio approach as the underpinning, according to Kellan Williams, customer and quality analytics manager at Safelite.

Williams set out with a challenge to interpret the textual comments about reasons for high or low scores among the 500,000 survey responses the company collects annually in its customer satisfaction survey and to link them to other data like Net Promoter Scores. An initial attempt to use standard text analytics software proved inconsistent. Instead, the firm dramatically upgraded by starting with text analytics software and applying sentiment analysis and automated text categorization methods to these open-ended responses. This combined approach delivered results within a week of adoption, entire datasets processed and analyzed within hours rather than days or weeks and at last, truly actionable NPS data (see Figure 4).

Unlike some text analytics methods, which essentially perform a new analysis each time, Williams advocates applying the same analytical framework, improving this incrementally every month. "Being able to have consistent methodology and consistent algorithms that are applying the sentiment is really what has given me the ability to have actual insights out of the data," he says. "We are definitely making decisions based on text analytics that are improving our customer experience. We have the whole picture of our customer and we are not doing anything extra to touch that customer. It's data we already are gathering. It's like doing a bunch of research projects or focus groups within one dataset."

Capitalizing on real opportunities

It is not just in resolving issues where the multi-technology approach wins; it is also in capitalizing on real opportunities. Consider a more complex scenario, with research data taxonomy designed to capture every possible aspect of customer experience. Research firm Market Strategies had just such a challenge. With a goal of automating as much of the work as possible without sacrificing quality, Market Strategies capitalized on the opportunity to utilize all three text analytic technologies: NLP, semi-automated coding and machine learning. The result was powerful, with a 95 percent reduction in labor hours, increased productivity by a factor of 21 and enhanced quality control.

Combining the three analytical methods allowed Market Strategies to bring the voice of the customer into the heart of its client's analysis of both market research and enterprise feedback management data.

Apply the right tool

In cases where the platform focuses solely on a single text analytics approach, there follows a mandate for the client to standardize on the provider's platform, often requiring complete replacements of existing systems and processes. A good analogy to this situation is the familiar saying: "When the only tool in your belt is a hammer, every problem tends to look like a nail." With a multi-technology approach, customers can apply the right tool, or combination of tools, to the project at hand and thus deliver an efficient and effective solution.

Expanding your options to take advantage of an integrated suite of technologies allows you to keep your ears open to the customer, rather than getting stuck in the lull of simple white noise in a set collection-and-analysis platform. Even with a state-of the-art collection tool, the voice of the customer speaks loudest and most clearly outside of those boundaries. There is real power in this amplified ability to meet the customer where they are, rather than expecting them to conform to some other process and solution. It reveals the possibilities of both understanding and delivering the world through insightful application of compound data sets and multi-technology solutions to capture nuanced, actionable VoC and drive material ROI from effective and efficient CEM.

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●●● health care research

The rules for following the rules

Seven ways to fail a consumer label comprehension study

| By Morris S. Whitcup and Keith LaMattina

snapshot

The authors outline steps for making sure marketing research on Rx or OTC drug labeling contributes to adherence to FDA Guidance.

The Food and Drug Administration (FDA) is charged with ensuring the safe use of prescription (Rx) and over-the-counter (OTC) drugs in the United States. The FDA is vitally concerned that consumers understand the correct use of OTC medications and has issued detailed Guidance about proper drug facts labeling. The Guidance requires that the outside packaging and/or the container itself have information about: the name of the medication; its ingredients; uses; warnings and contraindications; dosing; and other information that may be deemed pertinent by the manufacturer[1].

The FDA usually requires that a consumer label comprehension test be conducted:

- when a product switches from Rx to OTC status;
- is newly introduced;
- when there is a new indication or target market;
- if changes are made in directions or warnings; or
- if there are other substantial changes in formulation or dosing.

Guidance for this type of research was issued in August 2010[2] and forms the basis for this article. Commentary is also included based upon actual experience in conducting such studies. Although the manufacturer's following of the FDA Guidance is not mandatory, the Guidance is evidence of the FDA viewpoint on these matters and any deviance from the Guidance should be carefully considered.

Potential failure #1: Not (adequately) specifying primary and secondary communication objectives

The Guidance specifies that both primary and secondary communication objectives (if any) be detailed before conducting label comprehension research. Endpoints, based on

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comprehension levels in specific questions, are also included in the protocol that companies prepare before conducting a label comprehension study. Sounds easy, right? Actually, setting these objectives is a complex task:

- The endpoints should be based on clinical criteria and pre-study discussions with the FDA. Correct communication is critical for clinically relevant items (such as warnings and contraindications) and less important for "nice to know" information.
- Including too many objectives may lead to failure, inasmuch as success or failure will be judged based upon achieving each of the endpoints.
- Having too many questions or items addressing each endpoint may result in only a partial success; with lack of correct consumer comprehension for some and higher levels of correct understanding for others.
- Setting the bar too high for desired levels of correct communication for endpoints can lead to failure. Not only must the specified correct levels of response be achieved, they must also be statistically reached at the 95 percent level of confidence. Thus, for example, achieving 85 percent correct comprehension may necessitate a 90 percent correct level of comprehension because of the range for the statistical confidence associated with each response.

Potential failure #2: Conducting Internet interviewing

For many business decisions of consequence, Internet interviewing predominates. Such interviewing is cost- and time-efficient. However, it is inappropriate for consumer label comprehension studies:

- Internet interviewing has no built-in visual verification that a real respondent exists and may have serious population skews.
- The Internet population excludes respondents who have no access to the Internet and is thus a biased population.
- Consumer reading and attention to actual packaging during an in-person interview is far different than perusal of packaging shown on a screen in Internet interviewing.

Potential failure #3: Interviewing only the target market

Marketers are traditionally taught to focus marketing efforts on the target market for a product.[3] The target is often based upon prior category or brand use, age or other demographics, attitudinal or psychographic segments, family lifecycle, etc.[4] FDA Guidance, however, stipulates a broader audience than the medication's target: "Because the non-prescription drug products are available for purchase without a learned intermediary, and since no drug product is administered in the study, exclusion factors should be minimal (e.g., inability to read and understand English) and should be justified in the study protocol."

At first blush a broader sample may seem to place an undue burden on companies. A priori, one may

assume that target consumers and actual users of the category are more familiar with the medication. However, actual experience conducting label comprehension studies also indicates that target consumers may be less attentive in the reading of drug facts labeling, thus canceling out any familiarity advantages in understanding that target consumers may have.

Potential failure #4: Conducting a true "all comers" study

The Guidance states that the study should include all subjects who can potentially use the drug product, regardless of age, sex, underlying medical conditions and use of concomitant medications. Logically this implies what is known as an "all comers" study without any restrictions.

However, such a "random" sample would not be truly random!

- Shopping malls, where consumer label comprehension studies are typically conducted at interviewing facilities, do not yield a random population. The mall population skews female and younger. Depending upon the specific malls involved, the mall population may have little representation of various minority ethnic populations (e.g., African-Americans, those of Hispanic heritage, etc.) and lean towards a middle-class population.

- Furthermore, the mall population may have few respondents with lower levels of literacy. Guidance specifically states that label comprehension studies should have adequate inclusion of such low-literacy respondents (who score at the 8th grade reading level or lower based upon reading tests such as the Rapid Estimate of Adult Low Literacy in Medicine[5]). Although augment ("supplemental") interviewing is often needed to enroll an adequate number of low-literacy respondents, prudent mall site selection can boost the number of low-literacy respondents who naturally would be screened and interviewed.

Study population controls are therefore necessary for a supposedly random sample to be more representative.

Potential failure #5: Not pre-testing the questionnaire and study procedures

As marketers and social scientists, many of us could construct good questionnaires in our sleep. Pre-tests thus seem an unnecessary cost and slow down study implementation. However, this is not the case.

- The Guidance assumes that study questionnaires will be pretested.
- Pretests may uncover lack of understanding of the issues due to questionnaire wording or question/item placement (and not what is to be elicited from reading the medication package). Improving correct understanding even by a few percentage points can mean the difference between obtaining an acceptable level of comprehension or not.
- Label design can also be improved through pre-testing, even by something as simple as highlighting a label facts item that is inadequately comprehended.
- Pre-testing may discover questionnaire items whose levels of comprehension may be increased through use of techniques such as flash cards showing response alternatives, patient scenarios and other items.

Potential failure #6: Accepting a correct response as a correct response

A correct response is a correct response, isn't it? Actually, Guidance states that correct responses should be probed ("Why do you say that?") to ascertain that consumers correctly understand the drug facts labeling.

This process does lead to classification of "correct" responses as, in fact, incorrect when consumers give invalid reasons why they answered a question seemingly correctly. However, conversely, some apparently incorrect answers may be uncovered to be, in fact, correct, whereby the respondent evidenced correct understanding but for idiosyncratic reasons answered incorrectly.

Potential failure #7: Assuming that a PowerPoint presentation is the final product

The typical marketing research study is not normally a full report but a not-overly-detailed presentation. Label comprehension studies, however, require a detailed report in Word or other similar software with many appendices, including the protocol, questionnaires, study procedures, drug facts labeling tested, etc., as well as detailed statistically-tested tables of question responses.

Other avenues

While not typical, other avenues of potential label comprehension studies do exist, in particular:

- Arguably, the greatest addition pitfall is changing packaging wording/graphics after the label comprehension study is conducted. This may necessitate redoing the label comprehension study, adding to project cost and potentially delaying the submission to the FDA. The best way of guarding against changes is to fully pre-test the package before the label comp study is conducted.
- Using a comparator in assessing your own label communication is dangerous. There is sometimes the temptation to test an additional label (a competitor) to serve as a benchmark against which to measure the results for your own label. If your label is superior to the competitor, perhaps, to a limited degree, the FDA would be more inclined to judge your own label's correct communication to be "successful." However, the ultimate onus is on the manufacturer to demonstrate the success of its own label. Moreover, any ways in which the competitive label is superior would be potentially damaging to the acceptability of your own label's results.

Forethought and adherence

Label comprehension studies are, in many ways, radically different than many primary marketing research studies. Much forethought and adherence to Guidance are the best ways to help assure successful results.

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health care research

The cloud awaits yet health care hesitates

Study outlines issues facing health care IT pros

| By Christina Kyriazi

snapshot

As mobility, a more patient-centric focus and other trends transform the health care industry, IT professionals are seeking ways to keep pace with the changes. Outsourcing portions of their IT infrastructure can help but government regulations, security issues and other concerns are proving to be stumbling blocks.

It's an exciting time to be an IT professional in the health care sector – and a challenging one. A confluence of digital innovations and government-mandated reforms is transforming the industry. IT staffs are expected to help power the changes and they have their work cut out for them.

Emerging medical technologies demand more robust, agile platforms. Mergers and acquisitions among health care organizations necessitate a consolidation of disparate IT environments. Government mandates and changing regulations require the implementation of increasingly rigorous IT privacy controls and security policies. All the while IT professionals face many of the same challenges as their counterparts in other industries, from constantly-changing cyber threats to overburdened staffs.

Outsourcing – and leveraging cloud services in particular – has the potential to reduce some of the challenges, freeing IT staffs to put their efforts towards initiatives that can help advance health care delivery and quality. But are IT professionals in the health care industry taking advantage of IT outsourcing options such as the cloud – and if not, what is standing in their way?

Peak 10 conducted a two-phase study to better understand the decision-making among IT leaders in the health care industry that leads to their adoption or rejection of outsourcing and technologies such as cloud computing. The first phase consisted of an online survey of 149 information technology decision makers (ITDMs) in the health care industry within the United States. The survey included 25 multiple-choice and/or open-end questions.

For the second phase, Peak 10 contracted with a third-party research firm to conduct one-on-one phone interviews with 11 participants from the initial survey. The results provide insight into some of the issues that are helping or hindering health care IT professionals. A copy of report is available at www.peak10.com. (Registration required.)

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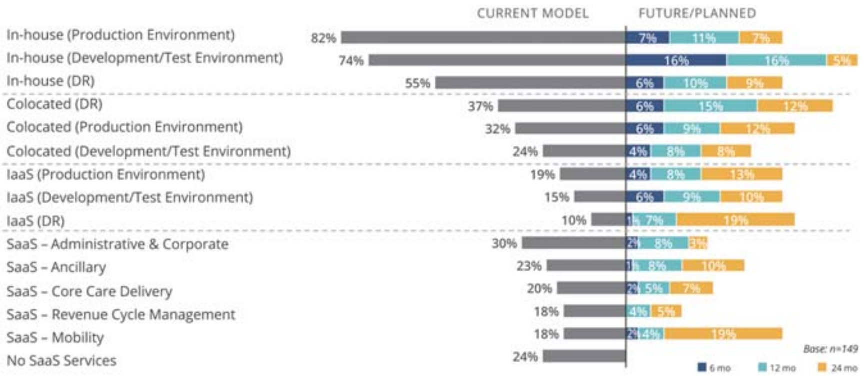
Figure 1

Technology Infrastructure Delivery Model

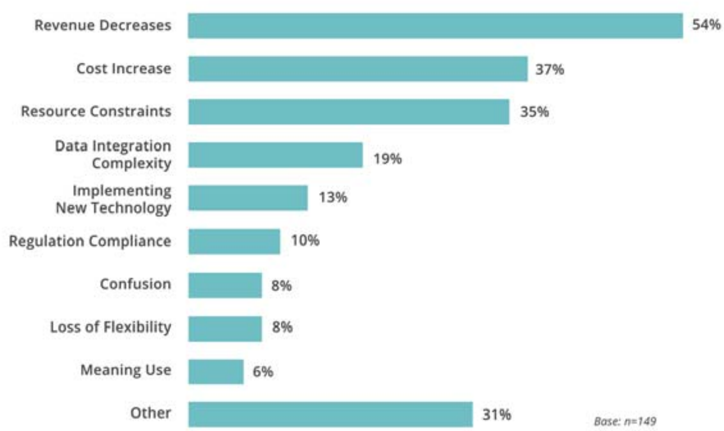


Q: Please select which of the following describe(s) your CURRENT technology infrastructure delivery model. Select all that apply.
Q: Please select which of the following describe(s) your FUTURE/PLANNED technology infrastructure delivery model.
Q: Does your organization currently subscribe to any of the following Software as a Service (SaaS) services?
Q: You indicated that your organization currently does not subscribe to the following Software as a Service (SaaS) services. Please select if you plan to implement any of them in the FUTURE.

Note: The percentages do not add up to 100% because respondents were allowed to select multiple responses.

Figure 2

Biggest American Care Act Impacts on Health Care Organizations



Q: What are the biggest impacts on your organization's IT from the Affordable Care Act?

Traditionally been hesitant

Outsourcing information technology infrastructure – whether via the cloud or colocation at a third-party data center – offers well-documented benefits. However, the health care industry has traditionally been hesitant to take advantage of them due to regulatory constraints. These findings were confirmed in the Peak 10 study with the majority (82 percent) of respondents noting that their organizations currently keep their mission-critical production environments in-house (Figure 1). Even non-core activities, such as testing and development, remained in-house for most respondents (74 percent).

However, the respondents' plans for technology implementations over the next six to 24 months did indicate a greater openness to IT outsourcing, especially for disaster recovery. One in three of those who don't currently outsource disaster recovery plan to do so over the next two years.

For many organizations, managing disaster recovery in-house has traditionally been an expensive proposition that requires significant capital expenditures for servers, storage, bandwidth and secondary recovery sites. Other organizations have simply neglected disaster recovery planning. Outsourcing – whether via colocation or the cloud – can offer a cost-effective way of meeting disaster recovery needs and let organizations tap the expertise of vendors who specialize in disaster recovery strategies.

Infrastructure-as-a-service (IaaS) models also seem to be gaining ground for supporting other workloads as well. Over the next six to 24 months, 25 percent of the survey respondents plan to implement IaaS for their production and/or testing and development environments.

Among the reasons for the growing interest in IaaS is that more companies are interested in avoiding the large capital expenditures associated with maintaining their own infrastructure. In addition, some IaaS models incorporate high-level security and technical controls that enable them to help organizations meet some of their regulatory compliance requirements. The use of IaaS also can free up organizations' IT staffs, enabling them to focus more on their companies' strategic initiatives.

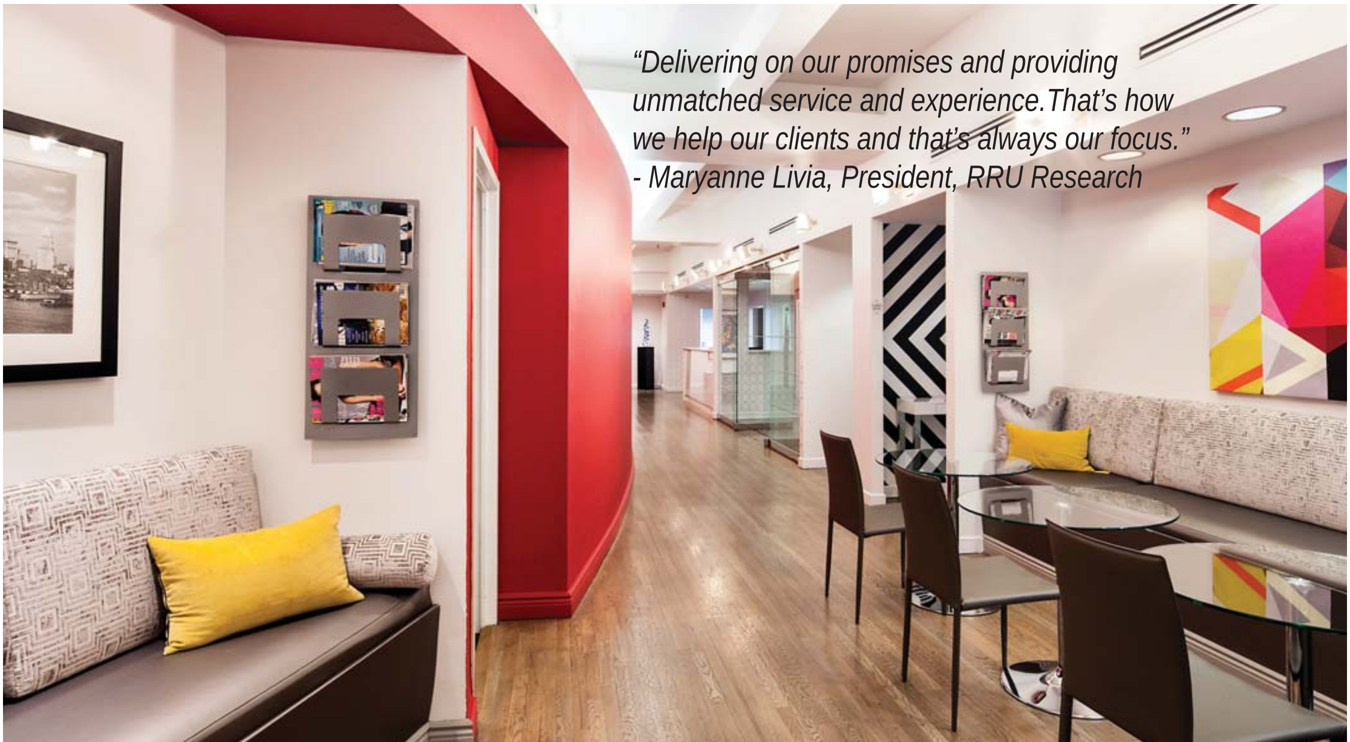
Do not have the flexibility

While 82 percent of respondents noted that their budget would increase or stay the same over the next 12 months, a lot of times they do not have the flexibility to spend it on exactly what they want. Software implementation, virtualization and meeting regulatory requirements topped the list of key priorities for the survey respondents – with regulatory requirements cited as often overriding virtualization and software implementation projects.

The survey respondents noted that components of HIPAA/HITECH, as well as ICD-10 and the Meaningful Use requirement in the Medicare and Medicaid Electronic Health Care Records (EHR) Incentive Program, were driving funding priorities. Many stated they "didn't have enough boots on the ground," explaining that standardizing on EHR and other primary applications were taxing internal resources and leaving little time for even considering large data center migrations. Additional resources were not forthcoming.

Surprisingly, 40 percent of the survey respondents stated it was too early to tell if the Affordable Care Act (ACA) would affect their IT departments; 24 percent offered no opinion. Only 22 percent reported that they had experienced any negative effects. Revenue decreases, cost increases and resource constraints were cited as the top three issues to date (Figure 2).

The ACA notwithstanding, government mandates in general significantly negatively affect IT, according



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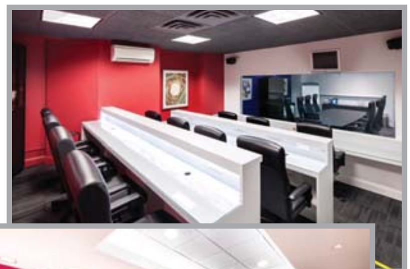

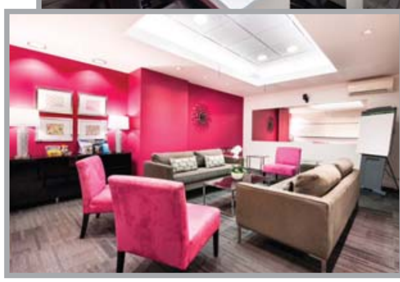

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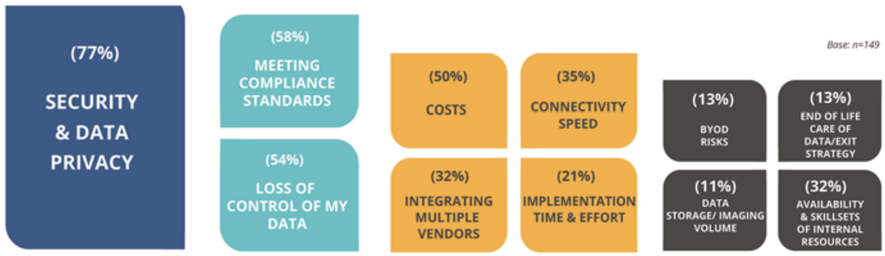
Figure 3

Barriers to Cloud IaaS Adoption among Health Care Organizations

Order/size of each attribute indicates the rank of importance and the percentages indicate the percent of respondents who selected each attribute.



Q: What are the top vendor attributes you consider when selecting or evaluating a cloud IaaS vendor? Drag & drop your top 5 attributes to the right and rank them with 1 being most important.

to 60 percent of the survey respondents. Only 2 percent claimed they have no influence.

Regulatory compliance issues also factor into many health care organizations' hesitance to use cloud computing, along with concerns over security and data privacy. All were cited as the top barriers to cloud adoption by survey respondents (Figure 3). The concerns are not without merit. Continuing a three-year trend, breaches in the health care industry topped the Identity Theft Resource Center's 2014 Breach List with 42.5 percent of the instances of compromised data identified in 2014.[1]

While not all the breaches were associated with cloud services, they nonetheless have made health care organizations wary. As one interviewee in the study stated, "What worries me is that what if I use a cloud service and the controls aren't in place? My data could slip into somebody else's environment or their data could slip into my environment. The repercussions could be disastrous."

For health care organizations subject to the requirements of HIPAA, those repercussions could come with a high price tag. In January 2013, the U.S. Department of Health and Human Services released its final HIPAA Omnibus Rule, which substantially increased the civil monetary penalties associated with a HIPAA privacy or security breach. A single instance of HIPAA non-compliance can cost the offending organization as much as $50,000 in fines. Additionally, health care organizations could incur up to $1.5 million in a 12-month period for repeated violations.

Under the HIPAA Omnibus Rule, cloud services providers and other external data services providers now share responsibility for meeting HIPAA requirements as they relate to electronic protected health information. However, that doesn't negate the damage done once a breach has occurred – including the subsequent damage to a health care organization's reputation.

Exploring the use

Nonetheless, health care IT professionals are exploring the use of cloud services. As has been seen in many industries, the Peak 10 study showed that their initial foray into the cloud is primarily through software-as-a-service (SaaS). A higher percentage of survey participants reported using SaaS than IaaS over the next two years, with 25 percent of those not currently using SaaS planning to do so.

SaaS represents an easy first step into the realm of cloud computing because of its cost-savings, flexibility, enhanced scalability, low maintenance and ability to handle common administrative software such as that used for human resources functions. It also can enable faster, more reliable access to applications from anywhere, which has significant implications for enhancing care delivery. For example, in hospital settings clinicians can access complete patient data from their mobile devices. This eliminates the need to stop back at nursing stations between patient visits and frees up more time to spend with the patients and, ultimately, help improve patient satisfaction.

Shadow IT and cloud sprawl

As health care companies explore cloud technologies, concerns over "shadow IT" and "cloud sprawl" cause IT professionals to hesitate moving too far forward. Shadow IT refers to the use of hardware or software that is not supported by its central IT department. Cloud sprawl is the unplanned, uncontrolled spreading of applications and services into the cloud. Both can introduce security and compliance risks, as well as make IT professionals' jobs more complicated. To manage the proliferation of disparate technologies, applications and implementations, an enforced IT governance decision-making framework and processes is essential with employee communication and education as key components.

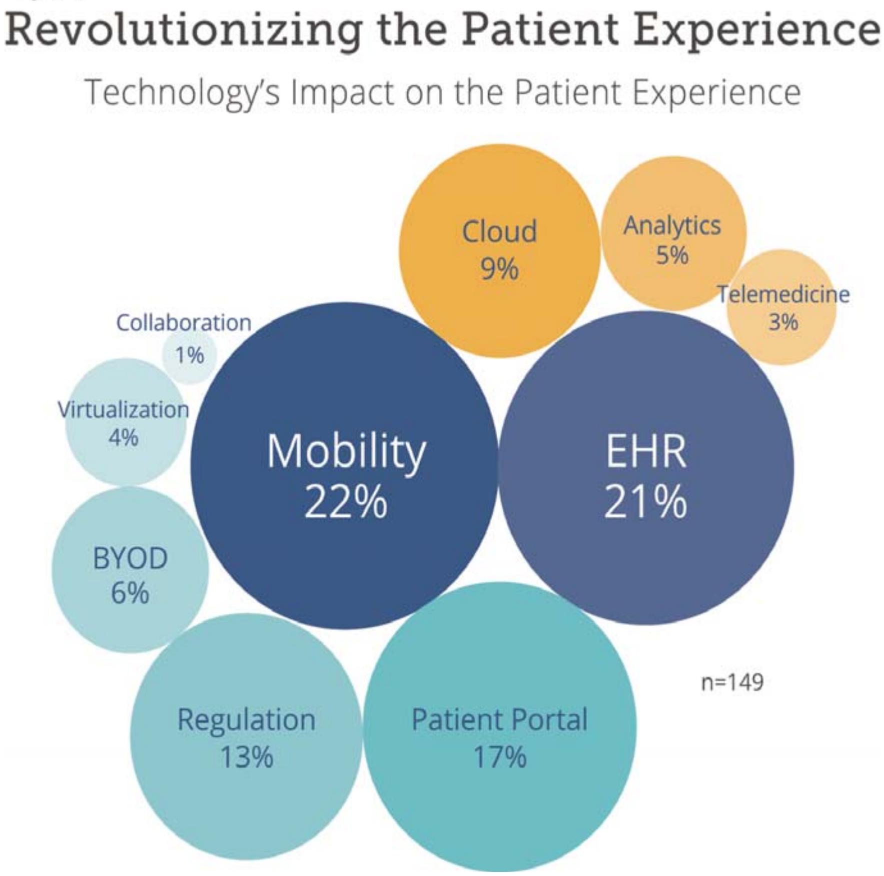
In addition, IT has traditionally been viewed as an administrative function rather than as a critical part of health care operations. As such, it has often not received adequate budget or resource support. That line of thinking is changing as health care organizations increasingly expect IT not to just support advances in the health care industry but to help drive them. However, in the interview portion of the study, it was noted that while the role of IT in transforming health care is increasing, the resources to help aren't.

Complex decision-making processes have also proven to be significant barriers to IT outsourcing in the health care industry. Most health care organizations have multi-layered governance and long-term strategic goals. IT decision-making and purchasing cycles can be long and contentious if not aligned with those goals. In addition, multiple departments are often involved – many of which work in siloes and have competing interests and priorities. Gaining consensus and approvals can be difficult.

Keep the momentum going

The challenges facing IT professionals in the health care industry are formidable but not insurmountable. Technological advancements are transforming health care delivery and it is becoming clear that IT must be equipped with the necessary resources to keep the momentum going. Much

Figure 4



of the impetus for change will come from an emphasis on the patient experience.

Across almost all industries, customers expect fast access, ease of use and personalized attention. It's no different in health care, where patients are no longer just patients. They are consumers and expect better services and more for their money. They want their health-related information at their fingertips as would be provided by a patient portal. They want their physicians to be able to approve prescription refills whenever they are needed, a function made possible with e-prescribing. They want "smart" rooms that enable them to customize their environments, instilling more of sense of control at a time when their conditions may make them feel particularly vulnerable.

Providers that fail to deliver these kinds of services – or that fail to provide their IT staffs with the resources to make these services available – will lose patients to the competitors who are leveraging technology to enhance the patient experience.

The IT professionals surveyed in the Peak 10 study are aware of the growing importance of a better patient experience and noted specific technology solutions that they believe will have the greatest impact on the patient experience in the coming years. Among them: mobility, electronic health record and patient portals (Figure 4). (See sidebar.) Whether or not support is provided to enable IT staffs to address these trends remains to be seen.

More overburdened

In industries ranging from finance to manufacturing, outsourcing at least portions of an organization's IT assets, to experienced, qualified third-party IT infrastructure vendors can yield a number of benefits. Among them: risk mitigation, reduced downtime and lowered costs. In addition, outsourcing has been shown to free overburdened IT staff from onerous daily infrastructure maintenance tasks. Few IT staffs are more overburdened that those in the health care industry. That makes outsourcing all the more desirable for this sector – especially if it can free up IT staffs to focus on strategic initiatives, particularly those related to enhancing care delivery and quality.

As health care IT professionals see the successes generated by outsourcing IT infrastructure in other industries, especially those subject to similar rigorous regulatory requirements and security issues, they may become more amenable to the use of cloud solutions, colocation and other services.

Technology is transforming the health care industry. It makes sense for those charged with managing and implementing that technology to have access to the resources that can make the job easier – cloud and data center services included.

Christina Kyriazi is manager of insights and analytics at Peak 10 Inc., a Charlotte, N.C., infrastructure provider. She can be reached at christina.kyriazi.com.

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[1] "Business strategy: U.S. clinical mobility 2011-2016 – forecast and analysis," IDC Health Insights Survey.

[2] "The value from investments in health information technology at the U.S. Department of Veterans Affairs," Colene M. Byrne, Lauren M. Mercincavage, Eric C. Pan, Adam G. Vincent, Douglas S. Johnston and Blackford Middleton.

Names of Note

In Memoriam...

■ **Richard H. Bruskin**, founder of research firms *AdverTest Research*, *R.H. Bruskin Associates Inc.* and *Bruskin Marketing*, died on June 25 at the age of 91.

■ As reported by the Scarsdale Patch, researcher **Jane Goldwasser** died on July 17 at the age of 69. She was president and CEO of White Plains, N.Y., business management consulting firm *New Directions Consulting* and held positions within the QRCA and the Creative Education Foundation community.

■ Columbia, Md., marketing agency *Merkle* has appointed **Michael Komasinski** as COO of digital agency services and **Gerry Bavaro** as senior vice president of enterprise solutions group.

■ Costa Mesa, Calif., firm *MFour Mobile Research* has hired **Hasan Yasin** as project manager and promoted **Dennis Kim** to director of quality and integration. Also, **Kevin Norlander** has been added as a graphic designer, **Alexander Leipf** has been named senior project manager, **Patrick Barnum** has joined as a Web application programmer and **Andrea Han** has been named senior research consultant.

quirks.com/articles/2015/20151012.aspx

■ **Gerald Lombardi**, research director at *Hall and Partners Health*, is relocating from New York to the Tokyo office.

■ Cincinnati firm *Directions Research* has announced the following new hires: **Aaron Gulley** as senior account executive; **Amy Webb** as a qualitative research consultant; **Ashley Bella** as a design specialist and **Brock Whitaker** as an interface developer. The firm also promoted **Kathy Campbell** to senior research manager.


Gulley


Webb


Bella


Whitaker


Campbell

■ Virginia Beach, Va., firm *Issues and Answers Network Inc.* has appointed **Ginger Blazier** as senior vice president of business development.

■ Paris firm *Ipsos* has appointed **Rob Myers** as the new country manager in Canada and appointed **Margaret Kohler** as the CFO for North America.

■ Cincinnati researcher *Burke Inc.* has appointed **Amy Dahlke** as senior account executive in client services.

■ Oslo, Norway, data service provider *Norstat* has appointed **Francesco Renga** as country manager for Norstat Italy.


Renga

■ *The NPD Group Inc.*, a Port Washington, N.Y., research firm, has hired **John Bremer** as senior vice president of research science.

■ Mentor, Ohio, marketing firm *WorkPlace Impact* has appointed **Heather Magnussen** as director of sales for the company's consumer packaged goods business.

■ Portland, Ore., technology company *Dialsmith* has appointed **Kati VanLoo** as the PR and marketing coordinator for its corporate marketing team.


VanLoo

■ Plainsboro, N.J., firm *Michael J. Hennessy Associates Inc.* (MJH) has appointed **Jim Callandrillo** as executive vice president and general manager of *HRA Healthcare Research and Analytics*, a consultative health care market research practice that is part of the MJH family of businesses.

■ *LiveRamp*, a San Francisco company that connects digital marketing and media platforms, has appointed **Luke McGuinness** as head of data partnerships.

■ Paris research firm *Ipsos* has appointed **Peter Minnium** as president of *Ipsos Connect* in the U.S. and named

Jim Meyer, former CEO of *Ipsos ASI* in North America, to the newly created position of chief marketing officer.

■ New York marketing consultancy *Gain Theory* has appointed **Karen Kaufman** to managing partner, client development for North America and Latin America.

■ *Research and Marketing Strategies Inc.*, Baldwinsville, N.Y., has promoted **Sandy Baker** to senior director of business development and corporate strategy and **Susan Maxsween** to senior director of health care operations and compliance.


Baker


Maxsween

■ Digital audience measurement firm *Effective Measure*, based in Melbourne, Australia, has appointed **Maria Java** as regional business director of its South East Asian market.

■ U.K. mobile research technologies and behavioral data firm *RealityMine* has appointed **Dottye Gould-Smith** to director of product methods. She will be based out of the company's New York office.

■ Chicago public relations firm *Greentarget Global Group* has appointed **Kevin Iredell** as director of research. He will be based out of the company's New York office.

■ *Minteraction*, the digital unit of GroupM Thailand dedicated to research and consumer insights, has expanded its strategic communications department by hiring the following: **Chingcharn Kaveevuth** as associate director of digital strategy; **Payungsak Kiatruangkit** as manager of digital strategy and **Pan Jroongtanapibarn** as manager of strategy resources and insights.

■ *GreyShopper*, the shopper marketing arm of New York advertising and marketing agency Grey Group, has promoted **Sarah Green**, the managing director of its London office, to the newly created role of chief executive of its EMEA regions. Green will be succeeded by **Rob Sellers**.

■ Auckland, New Zealand, research data firm *Infotools* has appointed **Christina Costa-Connolly** as regional engagement director in Europe. She will be based in the company's London office.

■ Little Rock, Ark., data analytics and software firm *Acxiom* has appointed **Jeremy Allen** as president of marketing services.

■ Menlo Park, Calif., marketing analytics firm *Quantifind* has appointed **David Karnstedt** as CEO.

■ Needham, Mass., marketing analytics firm *In4mation Insights* has appointed **E. Craig Stacey** to lead its marketing performance measurement practice.

■ Farmington Hills, Mich., research and consulting firm *Morpace Inc.* has promoted **Susan Semack** to senior vice president of its health care division.


Semack

■ London advertising and big data company *BlisMedia* has promoted **Charlie Smith** to U.K. managing director and **Paul Thompson** to vice president of EMEA.

■ U.K. data analytics company *Aquila Insight* has appointed **Neil Carden** as director of business development. The firm also appointed **Matt Hollingsworth** as general manager of its London office.

■ Irving, Texas-based *M/A/R/C Research* has appointed **Renee Feldman** as the director of its qualitative practice and **Brook Fagley** as vice president of client services.

■ Troy, Mich., firm *Clear Seas Research* has promoted the following: **Mitch Uyeda** to senior research manager; **Dan Van Buhler** to research director; **Brian Beaudette** to director of insight innovation and **Rebecca Merrell** to project manager of myCLEARopinion.

■ San Jose, Calif., television services firm *TiVo* has appointed **Frank Foster** as senior vice president and general manager to run TiVo Research and Analytics.

■ New York B2B marketing agency *Stein IAS* has appointed **Jason Abbate** director of interactions.

■ Mountain View, Calif., qualitative analytics firm *YouEye* has appointed **John Ruiz** as vice president of engineering and **Richard Clayton** as principal software architect.

■ **Scott Layne** has joined Atlanta insights and consulting firm *CMI* as president and COO.

■ *Nielsen*, Wilton, Conn., named **Eric Dale** as its new chief legal officer.

■ U.K.-based *DJS Research* announced four promotions and two new hires. The promotions: **Alistair Smith** to operations manager for data services; **Liam Higgins** and **Matt Walker** to senior research executive; and **Beth Harcourt** to marketing coordinator. In addition, **Christine Scally** and **Holly Slater** have joined the firm as field recruitment executives.

■ Los Angeles firm *Vital Findings* has appointed **Beth O'Shaughnessy** as senior director of research and design.

■ Greenville, S.C., marketing agency *Infinity Marketing* has promoted the following: **Courtney Amos** to endorsement supervisor; **Erin Ehrhardt** to senior multimedia designer; and **Caroline Castellaw** to social media coordinator.

■ Livonia, Mich., research firm *Market Strategies International* has appointed **Jeremy Bowler** as senior vice president of research and consulting in the financial services division.

■ *NBCUniversal* has promoted **Ari Perler** to senior vice president of research and strategy for NBCUniversal television and media distribution for the U.S. and Canada.

■ *AECOM*, a professional and technical services firm based in Los Angeles, has appointed **Luke Williams** as vice president of global client feedback. His position will include customer satisfaction research and he will be based in the firm's New York office.

■ Arlington, Va., research and analytics firm *Hanover Research* has appointed **Wesley Givens** as the new CEO.

■ London firm *Cello Health Insight* has appointed **Massimo Bufi** as senior methodologist of its intelligent quantitative research practice.

■ Mountain View, Calif., qualitative analytics firm *YouEye* has appointed **Naomi Grewal** as head of research.

■ Boston market intelligence firm *InCrowd* has named **Art McKee** as vice president of strategic alliances.

■ *Penn Schoen Berland*, a Washington, D.C., research-based consultancy, has appointed **Curtis Freet** as CEO of the firm's corporate and political business and **Jon Penn** as CEO of its media and entertainment business. Additionally, **Michael Pettingill** has been named to dual roles as the firm's COO and CFO.

■ Nashville, Tenn.-based *20|20 Research* has appointed the following to its business development team: **Jeff Grund** as senior vice president of business development; **Dave Bradford** as regional vice president for business development; **Frank Forney** as account manager; and **David Chandler** as business development director in Europe.

■ **Allison Kranz** has joined Barrington, Ill., firm *Relevation Research* as client service director.

■ Chicago-based food industry research firm *Technomic* has promoted **Sara Monnette** to vice president.

■ Boston e-mail marketing research and consulting firm *The Relevancy Group* has appointed **Nicholas Einstein** as vice president of research and principal analyst.

■ Rye, N.Y., institutional research and brokerage firm *G.research LLC* has appointed **John Tinker** as a senior research analyst covering media and Internet companies.

■ Miami-based cruise line *Royal Caribbean International* has appointed **Jim Berra** as chief marketing officer. His position will include brand strategy and positioning, Web and loyalty marketing and research, among other duties.

■ New York semantic search and natural language processing firm *NTENT* has appointed **Dan Stickel** as the new CEO.


Horine

■ Research firm *Schlesinger Associates*, Iselin, N.J., has promoted **Jason Horine** to vice president of client development for the firm's online qualitative solutions division.

■ U.K. firm *Face Facts Research* has appointed **Rachel Hoy** as managing director.

■ Chicago research firm *Fieldwork Inc.* has appointed **Denise Ambrose** as president of Fieldwork San Francisco.


Fischer

■ New York health care data collection firm *SHC Universal* has appointed **Brian Fischer** as senior vice president of client relationships.

■ Auburn Hills, Mich., firm *Gongos Research* has appointed **Jason Solack** as vice president of O2 Integrated, Gongos' data science practice. The firm also promoted **Crystle Uyeda** to director of business development.

■ **Gregg Lindner** has been appointed executive vice president of media research at *GfK MRI*, GfK's New York-based producer of media and consumer research in the U.S.

■ New York research firm *SHC Universal* has appointed **Hilary Fischer** as senior vice president of New Venture Acquisition.

■ Sioux Falls, S.D., marketing communications firm *Lawrence and Schiller* has appointed the following to research-related positions: **Erin Healy** as a consumer insights specialist; **Matt Hammer**, **Heather Krause** and **Kristin Duesterhoeft** as consumer insight coordinators and **Miki Miller** as a digital marketing analyst.

■ Warren, N.J., research firm *Lightspeed GMI* has appointed **Susanne Goller** and **Johannes Van Lochem** as account directors for its London office and named **Michael Krameisen** as director of business development.

■ U.K.-based firm *Mustard Research* has appointed the following: **Cheryl Anderson** as associate director; **Tom Webb** and **Jack Melton Bradley** as senior research executives; and **Bronagh Lavery** as a research executive. The firm has also promoted **Bethan Turner** to research manager and **Elizabeth Brierley** to senior research executive.

■ Mumbai, India, consumer products company *Marico* has appointed **Anuradha Aggarwal** as its new CMO.

■ New York firm *Radius Global Market Research* has appointed **Jeanette Vivier** as director of Radius Europe. She will be responsible for directing the London-based team.

■ *Fox Broadcasting*, Los Angeles, has appointed **Angela Courtin** as executive vice president and CMO.

■ *GfK MRI*, GfK's New York-based producer of media and consumer research in the U.S., has appointed **Kevin King** as senior vice president of mobile measurement and trends and **Karen Ramspacher** as senior vice president of consumer insights to the GfK MRI Product Innovation team.

■ Toronto brand loyalty agency *Bond*

Brand Loyalty has promoted **Scott Robinson** to vice president of design and strategy and **Anne Bowie** to vice president of live brand experiences.

■ Oslo, Norway, enterprise feedback management firm *Questback* has appointed **Edward Chatham** as head of market research. He will be based in the company's London office.

■ *IntelliShop*, a Perrysburg, Ohio, customer experience research firm, has appointed **Heidi Moore** as quality assurance manager.

■ China-based online and mobile commerce company *Alibaba Group Holding Ltd*. has appointed **Michael Evans** as president.

■ Baldwinsville, N.Y., firm *Research and Marketing Strategies Inc*. (RMS) has appointed **Danielle Park** as a health care transformation specialist for the RMS health care team.

■ London communications and marketing firm *Havas Media Group U.K.* has appointed **Yvonne O'Brien** as group chief insight officer, a newly created position.

■ New York media firm *Viacom* has appointed the following: **Bryson Gordon** as senior vice president of data strategy and Viacom Vantage; **Gabe Bevilacqua** as vice president of product management for Viacom Vantage; and **Kodi Foster** as vice president of data strategy.

■ Chicago car research site *Cars.com* has appointed **Colette LaForce** as its new CMO. Her duties will include brand marketing, analytics and communications.

■ *GfK North America*, New York, has promoted **Maria Lange** to business group director of the company's pet retail point-of-sale tracking team.

■ Reston, Va., researcher *comScore* has appointed **Aaron Fetters** as senior vice president of marketing solutions in Chicago.

■ U.K.-based *eDigitalResearch* has promoted the following: **Tobin Sparrow**, **Amelia Burnett** and **Lisa Williams** to associate directors; **Alex Hunt** to financial controller; **Sophie Miller** to product support manager and **Alan Evans** to research analyst.

■ Clearwater, Fla., health care system *BayCare* has appointed **Ed Rafalski** as chief strategy and marketing officer.

■ Atlanta merchandising solutions firm *Predictix* has appointed **Kevin Sterneckert** as executive vice president of marketing.

■ Cincinnati firm *MarketVision Research* has appointed two to its health care insights team: **Christina Brown Landon** as vice president and **Graeme Christianson** as research director.

■ London research and insight service provider *Research Academy* has appointed **Caroline Pakel** as an academy associate.

Research Industry News

News notes

■ In August, the **Marketing Research Association** (MRA), Washington, D.C., and the **Council of American Survey Research Organizations** (CASRO), Port Jefferson, N.Y., filed a motion to intervene in a court case against new Telephone Consumer Protection Act (TCPA) rules set by the Federal Communications Commission. In the motion, the organizations claim the autodialer definition in the updated TCPA rules that restrict the use of an autodialer needs to "be clarified to focus on the current capacity to generate and dial random or sequential numbers, and/or clarified to exclude calls that involve human intervention in the dialing." Because "cell phone numbers change subscribers frequently, and without notice," the associations argue that callers who have express prior consent to call a cell phone number should not be held liable if that number has been reassigned to a new subscriber unless the caller gains actual knowledge of the reassignment. Petitions opposing the new rules by ACA International, Sirius XM Radio and the Professional Association of Customer Engagement were consolidated into a single case before the U.S. Court of Appeals for the D.C. Circuit. CASRO and MRA filed a motion to intervene under their petition.

quirks.com/articles/2015/20151013.aspx

■ Washington, D.C.-based **Gallup** has agreed to pay a $12 million settlement fund for a class-action lawsuit that alleged Gallup violated the Telephone Consumer Protection Act (TCPA) by calling cell phones using an automatic telephone dialing system without prior express consent. The complaint alleged Gallup had placed millions of automated "market research" calls in violation of the TCPA over the past four years and allegedly caused consumers harm by having to deal with the annoyance of unsolicited phone calls and causing consumers to pay for minutes used. Gallup denies any violation or wrongdoing.

■ **The Marketing Research Association**, Washington, D.C., released the 29th quarterly wave of the Research Industry Index (RII), its study of economic health of the U.S. market research industry, in July. The study shows the RII has sustained a score of 100 or higher points for seven straight quarters, a strong indication the industry has recovered from the recession. The study also shows that executive management's outlook on the health of their organizations has continued to improve over time but the executive outlook metric was mostly flat or down slightly this and the previous quarter. Smaller firms continue to be the most likely to see a decrease in RFPs/proposals and to see flat or decreased revenues and more pressure on their margins. Large companies also reported a significant decrease in RFPs/proposals compared to the third quarter.

■ Des Moines, Iowa, researcher **Quester** has started Quester Cares, its first formal philanthropic program, which will fund market research in 2016 for select non-profit organizations. Quester will accept applications from qualifying non-profits through Oct. 31 and announce its selections on Dec. 1. The amount of research funds allocated will be based on 5 percent of total revenues during the firm's 2015 fiscal year.

■ Research firm **Advanis**, based in Alberta, Canada, celebrated 25 years in the market research industry in July.

■ Fort Washington, Pa., marketing and advertising firm **Audience Partners** was granted a second U.S. voter-targeted digital advertising patent to protect its invention that provides political media buyers and advocacy organizations with audiences for programmatic digital advertising campaigns across Web sites, mobile apps and electronic devices including addressable televisions.

Acquisitions/transactions

■ Airline company **Virgin Australia** has acquired Australia data analytics consultancy **Torque Data**. The acquisition is being undertaken by the airline's Velocity Frequent Flyer division and will integrate Torque Data fully in the customer loyalty program business.

■ Shelton, Conn., researcher **SSI** has successfully completed the acquisition of **MyOpinions** in Australia and **SmileCit**y in New Zealand. The acquisition combines the two panels with SSI's existing online panel to create the largest online panel in each country, the company said.

■ Oslo, Norway, firm **Confirmit** has acquired **Information Research Management** (IRM), its exclusive value-added reseller in Sydney. The acquisition will allow Confirmit to serve the Australian, New Zealand and Asian markets with local support. The newly combined business will be based in Sydney and will be known as Confirmit Australia Pty Ltd.

■ **The Pert Group,** a Farmington, Conn., research and consulting firm, and **MSS**, a Scottsdale, Ariz., research firm, announced the two companies have merged to create **Acturus**, a new brand that will offer custom research-based consulting services and multisponsored studies using qualitative, quantitative and advanced analytics techniques.

■ U.K. firm **Beaufort Research** has completed a management buyout with the help of funding from Finance Wales and Bibby Financial Services. With Finance Wales' £220,000 loan, directors Fiona McAllister and Chris Timmins were able to buy the agency.

■ **Simba Information**, a Stamford, Conn., provider of market research and analysis in educational and professional publishing, has completed the acquisition of Rockaway Park, N.Y., firm **Education Market Research**.

■ Paris firm **Ipsos** has acquired **RDA Group**, a Bloomfield Hills, Mich.-based research firm, and aims to develop an integrated global product offering in the field of quality tracking.

■ Australia-based online survey and market research firm **PureProfile** will use a $12 million capital raising to purchase Australian media trading group **Sparc** and open an office in New Zealand.

■ Tokyo online panel and research solutions provider **Marketing Applications Inc.** has acquired **Research Panel Asia** (RPA), a survey panel provider also based in Tokyo, in a stock swap. Voyage Group, RPA's parent company, exchanged 100 percent of its shares in RPA for a 35.61 percent stake in Marketing Applications.

■ San Francisco brand and marketing strategy consulting firm **Prophet** has acquired **Altimeter Group**, a technology research firm based in San Mateo, Calif.

■ Social technology solutions provider **Engagement Labs**, Montreal, has completed the acquisition of New Brunswick, N.J., research firm **Keller Fay Group** with the purpose of combining Keller Fay's offline word of mouth measurement data and analytics with Engagement Lab's social media analytics and technology platforms.

■ London digital media firm **Progressive Digital Media Group** has acquired business assets from **Informa**, a business intelligence firm also based in London. Informa's Datamonitor Financial, Datamonitor Consumer, MarketLine and Verdict businesses were purchased for £25 million.

■ Three employees of Clemson, S.C., firm **Sparks Research** have acquired the company from founder David Sparks and have assumed executive leadership roles within the company. Richard Groom has been appointed as the new CEO; Leanna Garrison has been appointed as COO and Jon Christiansen has been appointed as CIO.

■ Yorba Linda, Calif., holding company **Poplar Capital Partners** has acquired **Productive Access Inc.**, a research analysis software provider that created survey analysis tool mTAB. The two firms have jointly formed a new entity, **mTAB LLC**.

■ London media intelligence firm **Kantar Media** has invested in Israel-based data analytics firm **BIScience** and will enable the daily tracking of 22 million publisher pages and monthly tracking of 14.5 million campaigns over 35,000 ad platforms.

■ Reston, Va., wireless network analytics firm **Inovvo** has acquired the **Wireless Solutions** division of Reston, Va., Internet analytics firm **comScore**, including its Subscriber Analytix platform, which gives insight into subscriber digital preferences and behaviors. Inovvo will service all Subscriber Analytix clients and will retain licensing rights to the proprietary technology and data that were utilized as part of the platform.

■ Palo Alto, Calif.-based **SurveyMonkey** has acquired Emeryville, Calif., B2B software company **TechValidate**.

■ Stamford, Conn.-based **Information Services Group** has acquired Westport, Conn., subscription-based research and management consulting firm **Saugatuck Technology**.

■ Germany-based agricultural market research institute the **Kleffmann Group** has acquired Des Moines, Iowa, agricultural research and consulting firm **MarketSense Inc**.

■ **M4JAM** (Money for Jam), a South-Africa-based micro-jobbing platform, has acquired **Pondering Panda**, a digital market research company also based in South Africa.

■ Germany-based **GfK** has acquired Sweden-based company **NORM Research and Consulting AB**.

■ **MarketCast**, an entertainment-focused research firm based in Los Angeles, has acquired New York-based research and strategy agency **Insight Strategy Group**.

Alliances/strategic partnerships

■ Chicago firm **Information Resources Inc.** (IRI) has partnered with New York global data solutions provider **Return Path**, allowing IRI to integrate data from Return Path's consumer insight business and other e-commerce transactional datasets to create a comprehensive view of the online activity in the consumer packaged goods industry.

■ Belgium audience measurement firm **Centre d'information sur les médias** (CIM) has extended its contract with **GfK** to deliver television audience measurement service in Belgium until 2017. CIM has also re-signed GfK to measure radio audiences for an additional two years.

■ Tokyo firm **GMO Research** has formed a strategic business alliance with **BCARD**, a lifestyle and brand-focused loyalty program in Malaysia. The partnership allows GMO Research to conduct surveys targeting a consumer base of over 3 million consumers in Malaysia. In exchange for taking surveys, BCARD members earn loyalty points that can be redeemed at various stores or be used for items like airline miles and mobile minutes.

■ London market research report database **Market Publishers Ltd**. has signed a partnership agreement with San Francisco research and consulting firm **Grand View Research** for market research promotion on MarketPublishers.com, Market Publisher's online database, allowing the site to distribute and sell Grand View Research reports.

■ Boston social media analytics firm **Crimson Hexagon** has become a preferred analytics partner for social media site **Tumblr**, allowing the company to utilize Tumblr data to identify instances of brand mentions and logos, measure conversation volumes and analyze sentiment drivers.

■ India-based research and consulting firm **6Wresearch** has formed a research partnership with **PeopleLink**, a videoconferencing company also based in India. The partnership will allow 6Wresearch to publish research reports on the unified communication market with the support of PeopleLink.

■ Seattle firm **Burshek Research and Consulting** has partnered with Knoxville, Tenn., digital agency **PYXL**.

■ Tokyo firm **GMO Research** has partnered with Stockholm-based research panel provider **Cint** in an agreement that will connect GMO Research's Asia Could Panel platform with OpinionHUB, Cint's global exchange, and add over 3 million GMO Research respondents to existing active panelists.

■ Portland, Ore., researcher **Rentrak** has signed a deal with New York-based television sales company **Katz Television Group** that will provide Katz with Rentrak's suite of local market ratings services, including its automotive and political advanced demographics, to measure how local TV audiences view television over the course of the year.

■ **The Institute of Analytics Professionals of Australia** has finalized a merger with the **Association for Data-driven Marketing and Advertising**, a marketing body also based in Australia.

■ Mumbai, India, research firm **MRSS India** has selected Toledo, Ohio, technology platform provider **Shopmetrics** as a partner platform for its mystery shopping practice.

■ **INTAGE Thailand Co.** and **INTAGE Vietnam Limited Liability Company**, both group companies of Japan-based research firm INTAGE, have signed a deal with Stockholm platform and technology firm **Cint** to add their Thai and Vietnamese panels to Cint's global panel marketplace platform. They will also use Cint's panel management technology and supply chain management solution Access Pro to operate from one unified platform.

Awards/rankings

■ Stamford, Conn., research firm **FocusVision** was given a Stevie Award for Company of the Year at the 13th annual American Business Awards in Chicago in June. FocusVision was selected for its major business accomplishments over the past year in addition to the acquisitions of three market research technology companies.

Separately, **FocusVision** has been named the fastest-growing company of the year in the Best in Biz Awards 2015 International, an independent global business awards program judged by members of the press and industry analysts. FocusVision received this award for its recent expansions from its technology offerings to employee count.

■ **Worcester Polytechnic Institute** (WPI), Worcester, Mass., awarded **Jason Anderson**, a 1995 graduate of WPI, the Ichabod Washburn Young Alumni Award for Professional Achievement for his career as founder and president of **Insight Meta**, a market research gamification agency based in Kansas City, Mo.

New accounts/projects

■ U.K. audience measurement firm **BARB** announced that **Ipsos Connect**, part of Paris-based firm Ipsos, has won its new combined establishment survey and panel recruitment contract. The award is effective from January 2016 for an initial three years.

■ Iselin, N.J., research firm **Schlesinger Associates** has been selected as the recruiting and facility management provider for **Warner Bros. Media Lab**, a research facility based in Los Angeles.

■ Duluth, Ga., advisory service firm **Strategic Advisory Group** has been selected by the **Finger Lakes Regional Tourism Council**, a destination marketing organization based in Penn Yan, N.Y., to conduct a region-wide marketing analytics and strategic marketing plan.

■ Portland, Ore.-based researcher **Rentrak** has signed a TV measurement agreement with **KFMB-TV**, a CBS affiliate in San Diego that will use Rentrak's measurement system to provide ratings information from over 800,000 televisions in the San Diego market.

■ Baldwinsville, N.Y., firm Research and **Marketing Strategies** has received approval from the **Center of Medicare and Medicaid Services** to administer the 2015-2016 CAHPS for PQRS Survey, which is devised to obtain patient experience feedback about the care they received from group practices.

New companies/new divisions/relocations/expansions

■ London research firm RS Consulting has re-branded to **Bright Blue**.

■ U.K. data intelligence platform **LinkRisk** has re-branded to **Kerboo**.

■ Paris firm **Ipsos** has introduced Market Measurement, a new business unit that will be managed globally and aims to be recognized by manufacturers, distributors and retailers as a partner in developing and tracking sales and purchase effectiveness. Vural Çakir, the chief strategy officer, has been assigned to develop the global system and will work together with Renan Burduroglu, CEO of Ipsos Market Measurement. Shane Farrell, CEO of EMEA, will be the global head of the unit.

■ Berlin-based **Sociomantic Labs**, a firm that provides programmatic advertising solutions for advertisers, has opened a new office in Shanghai to deliver more localized services to the Greater China region.

■ Chagrin Falls, Ohio, research firm **Opinions Ltd.** has opened a mall-based data collection facility in Tukwila, Wash., Southcenter Mall that specializes in CLT, CAPI, mall intercept, focus groups, pre-recruits and on-site fieldwork. The firm has named Dorothy Thomas as facility manager.

■ Aptos, Calif.-based **Outsource Research Consulting** has re-branded to elucidate.

■ India research firm **Markelytics Solutions** has expanded into the Middle East and North Africa region by opening a new office in Dubai, United Arab Emirates, and has appointed Vinod Rao as director of research and business development.

■ London strategic insight agency **Firefish** has opened a new office in Singapore, to be headed by Angela Cross.

■ Costa Mesa, Calif., firm **MFour Mobile Research** will relocate to Newport Beach Gateway in Irving, Calif., effective November 1.

■ London market research consultancy **Incite** has opened a new office in San Francisco and has appointed Kevin Waters as the office's managing director.

Research company earnings/ financial news

■ Research firm **MRSS India** announced an initial public offering, opening June 30 and closing on July 2, a move which the company said made it the only research company to be listed on the Bombay Stock Exchange. Pantomath Capital Advisors, a SEBI-registered Category I merchant banker, was the sole lead manager to the issue.

■ Los Angeles firm **Lieberman Research Worldwide** (LRW) has raised significant growth capital from Tailwind Capital, a New York private equity firm. The capital will help LRW develop and expand its products and services and also be used for targeted acquisitions. Chairman and CEO Dave Sackman and President Jeff Reynolds will continue their current leadership roles and remain significant owners of the business. Terms of the transaction were not disclosed.

■ Chicago research data retrieval and visualization platform **KnowledgeHound** has closed a $1.2 million seed round, which includes investments from Jeff Cantalupo of Listen Ventures and Mark Mitten of Mitten Group. The funding will help KnowledgeHound continue to invest in its search engine, data visualization and data science teams and technologies.

■ Nashville, Tenn., prediction market research firm **Consensus Point** increased its revenue by 60 percent from existing clients and added 15 new customers in the first half of 2015.

■ Paris firm **Ipsos** has reported €832.9 million in revenue for the first half of 2015, up 10.2 percent compared to the same period in 2014. Organic growth was down 0.4 percent.

■ Tampa, Fla.-based **Study Hall Research** reported Q2 revenues increased by 101 percent versus corporate revenues for the same period last year. For the first half of 2015, YTD revenues increased by 75 percent over the same period in 2014 and contracted client engagements increased over 29 percent versus the first half of 2014.

■ **Nielsen**, New York, reported $1.56 billion for second-quarter 2015 revenue, down 2.2 percent due to the impact of foreign exchange but up 4.8 percent on a constant currency basis compared to second-quarter 2014.

■ Cambridge, Mass.-based **Forrester Research Inc.** reported its second-quarter 2015 financial results, with total revenues at $82.8 million, compared to $82.9 million in Q2 2014. Research revenues increased 1 percent and advisory services and events revenues decreased 1 percent compared to last year. On a constant currency basis, research revenues increased 4 percent and advisory services and events revenues increased 2 percent.

■ Stamford, Conn., technology research firm **Gartner** reported $547.9 million in second-quarter revenue, an increase of 5 percent over second-quarter 2014 and 12 percent excluding the foreign exchange impact.

■ Reston, Va., media measurement and analytics firm **comScore** reported a second-quarter revenue of $91.3 million, up 16 percent compared to second-quarter 2014.

■ Portland, Ore., research firm **Rentrak** reported its fiscal 2016 first-quarter financial results, with $27.5 million in total company revenue, a 23 percent increase from the same period last year.

■ Stamford, Conn.-based **Information Services Group** reported its second-quarter financial results, with second-quarter revenues of $53.4 million, up 6 percent in constant currency and down 3 percent on a reported basis from $54.9 million in second-quarter 2014.

■ Oslo, Norway-based **Questback** has raised £12 million capital from existing investors, including Reiten and Co. Capital Partners and First Fellow Oy, to invest in its market organization in the U.S., U.K. and central Europe and strengthen its investment in research and development to support its Enterprise and Essentials platforms.

■ Nuremberg, Germany, firm **GfK** has reported €747.2 million in sales in the first six months of 2015, a 7.1 percent increase compared to the same period last year.

CALENDAR OF EVENTS

••• can't-miss activities

QRCA will hold its annual conference on October 7-9 at the Hilton Bonnet Creek in Orlando, Fla. Visit www.qrca.org.

Richmond Events will host a conference, themed "The Market Insight Forum," on October 8 at the Harvard Club in New York. Visit www.us.marketinsightforum.com.

Worldwide Business Research will hold a conference, themed "Luxury Interactive," on October 13-15 at the Time and Life Building in New York. Visit www.luxuryint.com.

MSPA North America will hold its Customer Experience Conference on **October 13-15** at the Hilton Universal City in **Los Angeles**. Visit www.mspa-na.org/events.

Quirk's and **SSI** will host a Webinar, titled 'Understanding Today's Global Digital Citizen,' on October 15 at 12:00 p.m. CDT. To register visit http://bit.ly/1UVwDbU.

NMSBA will hold its Shopper Brain Conference on **October 15-16** at Hotel Casa 400 in **Amsterdam**. Visit www.shopperbrainconference.com/en.

CASRO will hold its annual conference on October 21-23 in Miami. Visit www.casro.org.

The Merlien Institute will host a conference, themed "Qualitative 360 Asia Pacific," on October 21-22 in Kuala Lumpur. Visit http://qual360.com/asia-pacific.

Global Executive Events will hold an event, themed "Unleashing Data: Innovations in Marketing, Research and Insights, Amsterdam," on **October 22-23** at the Mövenpick Hotel Amsterdam City Center in **Amsterdam**. Visit www.globalexecutiveevents.com.

The Life Insurance and Market Research Association will hold its annual conference on October 25-27 at the Sheraton Boston Hotel in Boston. Visit www.limra.com.

ESOMAR will hold a symposium, titled "RA:DAR Research Analytics: Digital Advanced Research," on **October 25-27** at the AOL headquarters in **New York**. Visit www.esomar.org.

Research and Results will hold its annual conference on October 28-29 at the MOC Convention Center in Munich, Germany. Visit www.research-results.com/trade-show/exhibitor-information.

Global Executive Events will hold an event, themed "Unleashing Data: Innovations in Marketing, Research and Insights, New York" on **October 28-29** at the India House in **New York**. Visit www.globalexecutiveevents.com.

IIR will hold its Market Research Event on November 2-4 at the Rosen Shingle Creek in Orlando, Fla. Visit www.iirusa.com/research/event-home.xml.

The Merlien Institute will hold a conference, themed "Market Research in the Mobile World Africa," on **November 3-5** in **Cape Town, South Africa**. Visit www.mrmw.net/africa.

Marcus Evans will hold its Design Thinking for Financial Services Conference on **November 5-6** in **New York**. Visit www.marcusevans.com.

The Incite Group will hold its Incite Text Analytics Summit: West on **November 5-6** at Hotel Nikko in **San Francisco**. Visit www.incite-group.com.

The Incite Group will hold its Incite Summit: East event on **November 12-13** at the Marriott Brooklyn Bridge in **New York**. Visit www.incite-group.com.

The Conference Board will hold its Customer Insights Seminar on **December 9-10** at The Conference Board Conference Center in **New York**. Visit www.conference-board.org.

MRA Great Lakes Chapter will hold its winter conference on **January 20-22** at the Diamond Head Beach Resort and Spa in **Ft. Myers Beach, Fla**. Visit www.glcmra.com.

IQPC will hold its Mobile Marketing Exchange event on **January 24-26** in **Santa Barbara, Calif**. Visit www.mobilemarketingexchange-usa.com.

Quirk's will be holding its 2016 Quirk's Event on **February 23-24** at the Marriott Brooklyn Bridge in **New York**. Visit www.thequirksevent.com.

To submit information on your upcoming conference or event for possible inclusion in our print and online calendar, e-mail Sara Potzmann at sara@quirks.com. For a more complete list of upcoming events visit www.quirks.com/events.

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BEFORE YOU GO ••• issue highlights and parting words

••• cover-to-cover

Facts, figures and insights from this month's issue

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The major purchase journey is getting shorter, with shoppers spending an average of 68 days researching a product (down from 80 in 2014).

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From a marketing perspective, the statistically significant difference of 20 points may be meaningful or meaningless.

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While some providers promote journey maps created solely in employee workshops, these run the real danger of institutionalizing employee biases as truth.

page 47

Customers do not care about the extent of a company's "omni-ness." They care about the quality of service.

page 68

Few IT staffs are more overburdened than those in the health care industry. That makes outsourcing all the more desirable for this sector.

Don't miss Quirk's fall party

Join Quirk's on Monday, November 2nd for a cocktail party at The Brick House Tavern in Orlando, Fla. Mix and mingle with other Quirk's subscribers and supporters at this casual networking event. The party is a perfect stop for those attending the 2015 TMRE Conference or anyone who is looking to relax in warm, sunny Florida!

Brick House Tavern offers a modern sports-pub atmosphere, boasting recliners, high-concept bar food and a huge selection of beer that attracts tourists and locals alike. Free drinks and appetizers will be provided.

Space is limited, so please register in advance at http://conta.cc/1JBEkkm.

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