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**Improving
Bottom Line
Performance
with Superior
Marketing
Intelligence and
Strategies**

PRESORTED
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PERMIT #2

Telephone Surveys to Build Customer Loyalty

(Continued from front page)

(1) The study identified specific communication activities with which the company could have intervened among disenrolling customers. This intervention could have allowed for not only continued, but *additional* sales; (2) Suggestions were provided for improving communications and contact with customers during their enrollment; (3) Opportunities for increased electronic interactions via the company's website were identified whereby our client could gather critical information to improve service and value; (4) Specific low-cost customer relations activities were suggested that could help prevent customers from disenrolling; recapture customers who left; and help build customer loyalty overall. As a result of this survey our client has instituted a re-marketing plan to reduce disenrollment in the client's health insurance plans. The client understands how important customer relations are for building loyalty.

You cannot afford to leave a bad impression with your customers....call us to find out how to optimize your customer relations.



Employee Spotlight Vance Marriner Senior Research Associate



Vance is a Senior Research Associate responsible for developing and executing customized marketing and research projects. Prior to joining RMS in 2003, Vance was an advertising manager for the Worcester Telegram & Gazette, a daily newspaper serving Central Massachusetts. Vance brings more than 12 years experience in marketing, research, advertising and media to his role as a Senior Research Associate at RMS. Throughout his career, he has proven adept at making research data accessible and clear to everyone from senior managers to front line workers, and then helping them use the information to improve products and services and grow revenue. Vance has a B.A. degree in Communication Studies from the State University of New York at Oswego and an M.A. degree in Advertising from Syracuse University's S. I. Newhouse School of Public Communications. He resides in Fulton, NY with his wife and two children.

RMS News

A Marketing Newsletter

Summer 2004
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Circulate to:

RMS Doubles Office Space

New Telephone Call Center

Research & Marketing Strategies recently added a new Telephone Survey/Interview Call Center. The new state-of-the-art telephone call and research center is home to our seasoned and professional telephone interviewers. All are skillful in conducting home and business interviews — and very successful at breaking through business screeners to interview senior managers. RMS's telephone interviewers are experienced in handling all types of telephone interviews from simple and straightforward interview instruments to more complex and multi-layered questioning tools.

Pleased with their new work area, the telephone interviewers are busy conducting quantitative telephone surveys, senior management interviews, customer satisfaction follow-up, and focus group recruiting for our clients. Let us assist you with your call center needs. Call center hours include weekdays, evenings and Saturdays.

In addition to the new call center, the office expansion includes a new client conference room and market research library. Call to make an appointment to stop by and see our new expanded market research office space.



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What Do You Think?

E-mail your comments, ideas or suggestions for the newsletter to:

PatF@RMSresults.com

Thank You!

A special thanks to all who shared comments and thoughts on the first edition of our newsletter. We reviewed them all and incorporated many of the suggestions into this version.

Case Study

Telephone Surveys: A Tool for Building Customer Loyalty



Have you ever wondered, "Do I really understand how our customers perceive our company? Do I know the key drivers in their selection process? Do I really know what it takes to build satisfaction, and more importantly—loyalty?" And lastly, "Do I know the true reasons why a customer stops buying my product or service?" With the answers to these questions you have the key to a better understanding of your customers and your own internal sales and marketing process. Customer feedback will allow you to take the steps necessary to increase customer loyalty, overcome price objections and facilitate your company's growth.

Telephone surveys are a timely, personal, and effective way to communicate with customers. RMS recently completed such a telephone survey and analysis for a health insurance client interested in finding the answers to all of the questions raised above. Conducted in the new RMS Telephone Call Center, the 10-minute telephone survey was statistically reliable within a $\pm 4.32\%$ margin of error rate at the 95% confidence level.

The final report detailed a number of specific recommendations based on the survey findings. This list of detailed and actionable activities or processes was based on the responses from 400 survey respondents. Here are just a few of the recommendations provided in general terms:

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FUN FACT #102: The first ball point pen was sold for \$12 in 1945.

Research Toolbox

Telephone vs. Mail Surveys

Client Comments

"RMS was very responsive to our needs. Adaptable and solves problems.

Interaction with participants was excellent. Handouts and AV materials were very useful. Very pleased with the outcome."

-HIPPA Compliance Implementation Task Force

"Personal service from principal. Staff very responsive to questions, calls, and e-mails during project. Great knowledge and experience base. Very thorough and professional."

- RMSCO, Inc.

Survey research is known as "primary" research because it is obtained directly from the targeted audience. It is a very powerful, direct and versatile way to obtain information about your market. RMS employs surveys to help solve a wide variety of marketing challenges for our clients. A common dilemma for many organizations is determining what type of survey is most appropriate for the situation. Probably the two best-known survey types are **telephone surveys** administered by a trained surveyor over the phone, and **written surveys** sent by mail or fax (also known as self-administered questionnaires.) These are not the only types, nor are they appropriate for every research situation, but they are widely used. Therefore, this article focuses on the distinct advantages and disadvantages to both survey types. Before deciding which to use, here are some questions to ask:

1. What are the quantity, scope and nature of the questions being asked?

Telephone surveys lend themselves to a relatively small number of questions with limited response sets. An example of a question that would be appropriate for a telephone survey might be, "Have you shopped at XYZ Department Store in the past 30 days?" Mail surveys can be longer and more detailed. They are useful when there are more questions and the response sets are more complicated. A mail survey might ask, "Below is a list of stores in the area. Please check all of those at which you have shopped," with separate columns allowing for multiple responses such as "in the past year," "in the past 30 days," or "in the past 7 days." The nature of the questions being asked is also a consideration. Many people are generally more comfortable divulging sensitive or personal information behind the relative anonymity of a written questionnaire than they are to a stranger on the telephone. If a proposed survey touches on a lot of sensitive areas, an anonymous mail questionnaire would probably be the preferred option.

2. How much time is available for the project?

A relatively quick turnaround time is a key advantage of telephone surveys. Depending on the length of the interview and the required number of completed interviews, the data collection phase of a telephone survey project might only take several weeks with an appropriate number of tele-surveyors working on the project. Mail surveys however, could require an additional four weeks for data collection because of the reliance on the respondent to complete and return the survey in a timely manner. Additional mailings are often necessary to improve response rates of written surveys. Written survey time can be reduced when using a fax or email survey, however this also has limitations.

3. What are the budget and resources available for the project?

Telephone surveys are typically more expensive to administer than mail surveys. (Experienced survey callers can ensure higher response rates and better quality data due to their ability to probe for answers.) Telephone surveys can often provide more in-depth responses. A written questionnaire requires far fewer resources. It is possible for one person to create and execute a mail survey project from beginning to end, while telephone surveys typically require experienced survey interviewers in addition to the person creating and analyzing the survey.

4. What is the desired response rate?

Obviously, the highest possible response rate is always desirable no matter what type of survey is conducted. Telephone surveys typically yield a significantly higher response rate than written

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Telephone vs. Mail Surveys

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questionnaires because of the ability of a tele-surveyor to encourage respondents to complete the survey. It is also easier for a targeted respondent to ignore a piece of mail than a telephone call. The response rate for a written survey can be greatly improved by factors such as including a prepaid postage envelope, a persuasive cover letter, follow-up reminders and offering a monetary incentive for completing and sending in the questionnaire. But even with all those measures, response rates for written surveys are likely to be lower than that of a telephone survey.



5. What is the most effective way to reach and communicate with people being surveyed?

There are special circumstances that make certain populations difficult or impossible to reach by phone, by mail, or both! Not everyone in the United States has a telephone in his or her home. While this only represents about 5% of the total population, it is a consideration when the survey is targeting low-income households or people in remote rural areas. A more common problem is that it is often difficult to reach people at a convenient time for them to complete the survey. Additionally, there is an increasing trend, particularly among younger consumers, to use their cell phone as their primary phone. Communicating through the mail requires thoughtful groundwork of its own. The accuracy of the mailing list and questionnaire readability are also important considerations. The questions must be clear and understandable to the respondent. Unlike a telephone survey where the caller can provide further explanation to a respondent, a question on a written questionnaire has to stand on its own.

With any research undertaking, the reliability and usefulness of the data gathered will depend largely on doing careful and thoughtful upfront planning. Asking questions like those listed above is part of the planning process. Of course, these questions just begin to scratch the surface of the many considerations that go into designing and conducting survey research. If you have not embarked on a research project in the past, you can avoid a lot of common pitfalls by working with an experienced market research consultant or agency. If you would like more information about surveys, or ways in which survey research might address some of the challenges facing your organization, the staff at Research & Marketing Strategies would be happy to talk with you. Please feel free to call us at 315-635-9802 with your questions.

President's Corner



Mark Dengler
President

We are excited about the continued growth of Research & Marketing Strategies and the expansion of the new Telephone Survey/Interview Call Center (Page one, *New Telephone Call Center*). The call center expansion allows us to better serve our clients' needs. With experienced and professional telephone interviewers in our state-of-the-art facility, we provide consumer and business-to-business telephone interviewing services. By offering this capability, RMS is able to enhance its research services while keeping costs for the client low. If you have any questions about how market research can help you better understand your customers or your competition, new product development, or advertising campaign effectiveness feel free to call me. I would be happy to discuss how RMS can help your company determine what needs to be done to improve your company's image and awareness, product perception, customer relations and ultimately increased market share. I hope to have the opportunity to meet with you soon.

RMS Professional Services Include:

- ✓ Custom Primary Data Obtainment
 - Telephone Surveys
 - Written Surveys
 - Focus Groups
 - Personal Interviews
- ✓ Site Selection Research
- ✓ Strategic Planning
- ✓ Customer Satisfaction Measurement
- ✓ Competitive Positioning & Intelligence Gathering
- ✓ New Product/Service Feasibility Studies
- ✓ Customer Profiling
- ✓ Geographic Analysis of Business Patterns

**Call us at:
315-635-9802**