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Consulting Projects

General Industry Marketing Research and Consulting

- Conducted a focus group study to evaluate the viability of new life and health-related insurance products among National Education Association (NEA) Member segments.
- Conducted a focus group study to determine consumer reaction to new Bank of America deposit products and relationship banking programs.
- Analyzed 3 years of data to determine the most effective promotions for National Education Association giveaway items.
- Conducted a focus group study to determine NEA Members' need for Accidental Death and Dismemberment Insurance.
- Conducted a focus group study to determine consumer reaction to a new American Express Credit Card.
- Conducted a study to assess the viability of new life insurance products targeted to people age 50 to 65.
- Conducted a study to evaluate advertising and promotional themes for the NEA Term Life Insurance Product.
- Conducted focus groups to evaluate potential web-based offers on the NEA Member Benefits Web Site.
- Conducted a study to assess the viability of new life insurance product concepts for NEA Member Benefits & Prudential Life.
- Conducted focus groups to understand the needs of state education leaders.
- Conducted a focus group study to assess the need for and interest in the NxLevel Seminar for Agricultural Entrepreneurs.
- Analyzed data and prepared a report of the findings for the NEA Member Benefits Internet Usage Survey.
- Conducted focus groups for NEA Member Benefits and Minnesota Mutual Life to determine the best advertising themes and approaches for the NEA Preferred Term Life Insurance Plan.
- Conducted focus groups for NEA Member Benefits and Minnesota Mutual Life in order to understand the life insurance purchase process and evaluate the new NEA Preferred Term Life Insurance Plan.
- Conducted an assessment of NEA Member Benefits competitors in the term life insurance industry.
- Conducted a segmentation study of lapsed customers and lost applicants for NEA Member Benefits. Employed factor and conjoint analysis (based on primary and existing demographic data) in order to identify actionable segments in these markets.
- Conducted a focus group study for NEA Member Benefits and MBNA on credit card usage and preferences among educators.
- Conducted a marketing audit for WVRU, the radio station of Radford University.
- Conducted a focus group study of local presidents and association representatives for the National Education Association. The study is focused on the assessment of various publications, electronic conferencing, and the Local President Time Release Grant.
- Developed direct mail packages for the National Education Association and Prudential Life Insurance Company. The direct mail packages included a brochure, introductory letter, rate sheet, and outgoing and return envelopes. The products advertised were the NEA Term Life Insurance Program and the NEA Accidental Death & Dismemberment (AD&D) Insurance.
- Conducted a focus group study for NEA Member Benefits and AT&T to assess teachers' reactions to a proposed long distance program targeted toward educators.

- Conducted focus groups for Nationwide Life Insurance Company and the NEA Member Benefits regarding educators' perceptions about annuities as a retirement savings vehicle and a proposed variable universal life insurance product.
- Conducted a survey of state coordinators for the National Education Association (NEA) Member Benefits regarding their usage of and satisfaction with the Media Kit (a tool used in developing local and state advertisement targeted toward educators). Tasks include development of the questionnaire, analysis of the resultant data, and preparation of a written report of the findings.
- Currently conducting a survey of Vermont educators for the National Education Association (NEA) Member Benefits on their attitudes and opinions toward retirement savings. Tasks include development of the questionnaire, analysis of the resultant data, and preparation of a written report of the findings.
- Conducted a series of focus groups in 1995 and 1996 for MBNA America and NEA Member Benefits focusing on educators': (1) credit card usage and perception of the NEA MasterCard, (2) perceptions about the NEA GoldCertificate CD and Money Market products.
- Conducted a series of focus groups for America Online and the National Education Association (NEA) Members Benefits division. The focus groups were done to assess educators' usage of the internet as well as reaction to the proposed NEA Online.
- Conducted focus groups for Prudential Life Insurance and NEA Member Benefits as a concept test of a decreasing term insurance program
- Conducted focus groups for NEA Member Benefits to evaluate a proposed new member benefit, the NEA Advantaged Buying Services, a bundle which includes travel offers, car purchase and leasing, health services, and retail purchases.
- Developed a readership satisfaction survey for Southeastern Virginia's largest newspaper, The Virginian-Pilot (VPLS). Analyzed the resulting data using multivariate techniques, including multiple regression, correlations and factor analysis, in order to measure the associativeness of the data. Gap analysis was employed to determine areas for future improvement. Additionally, developed a segmentation profile of newspaper readers.
- Conducted a mall intercept study for Deb, a women's apparel store. Women between the ages of 13 and 50 were interviewed in order to determine their awareness of Deb, assess their shopping patterns and behaviors, and determine the store, merchandise, sales and price attributes women place importance on when buying clothes.
- Conducted Mystery Shopping for First Hospital Corporation Mental Help Line. This help line is a self-help concept. "Mystery" calls were made employing various scenarios from which a qualitative assessment of the 1-900 psychological counselors was derived.
- Conducted a freshness test for Dunkin' Donuts. This study involved in-store tasting of current doughnut formulations prepared at differing time intervals in order to determine if customers could assess differences in the "freshness" of the product. In addition to taste testing the product, Dunkin' Donuts customers were also interviewed to determine their preferences and buying patterns.
- Conducted a study to determine the feasibility and market potential of providing low-orbit space craft launches from Wallop's Island, Virginia. Additionally, aerospace industry executives were interviewed in order to determine the models of infrastructure necessary for the privatization and commercialization of space.
- Conducted a shopper behavior and preference survey for J.C. Penney. Customers at two demographically disparate malls were interviewed to determine the attributes they valued in department stores, their satisfaction with anchor stores in each of the malls tested, as well as general shopping actions.
- Conducted customer satisfaction analysis and measurement for Sentara Norfolk General Hospital's Women's Health Pavilion. The data analyzed were obtained monthly from women who have given birth at Norfolk General Hospital.
- Conducted customer satisfaction analysis and measurement for Sentara Norfolk General Hospital's Surgical Diagnostic Center.

- Conducted concept test and evaluation of potential new product offerings for Pizza Hut. All respondents interviewed must have eaten pizza within the last six months. A sample of demographically representative Pizza Hut customers and non-customers viewed concept boards and were asked to rate each product on a series of attributes as well as their individual likelihood of purchase.
- Designed a central location study for WNOR FM-99, a classic rock radio station. Activities involved recruiting respondents fitting the appropriate station demographic profile, as well as re-screening participants and sponsoring the event.
- Created a patient satisfaction questionnaire for the Heart Pavilion at Sentara Norfolk General Hospital. Questionnaire development included a critical examination of satisfaction metrics and scaling alternatives. The three primary response categories evaluated were: performance measures; satisfaction measures; and expectancy measures.
- Conducted an ice cream taste test for Pet Foods. A mall intercept methodology was utilized screening for recent and frequent ice cream purchasers. Alternative new products/concepts were tested employing a double blind technique.
- Conducted customer focus groups for the Virginian-Pilot and the Ledger-Star. Various constituency groups, including both newspaper readers and advertisers, participated in numerous focus groups. The purpose of these groups was to determine areas of possible newspaper improvement.
- Conducted a national market study for *The Express Line*, a news and information publication distributed to residents of markets not subscribing to the local or regional newspaper (also referred to as a Total Market Coverage product). The study consisted of two phases: focus group research and a national descriptive research effort. The focus groups were conducted in two long-standing *The Express Line* markets, Dayton, Ohio and Lancaster, Pennsylvania with readers of the publication. The descriptive research effort involved interviewing a random sample of newspaper non-subscribers in 24 markets across the United States. The survey was developed in order to determine customer satisfaction, awareness, and usage for the publication.
- Conducted a Total Quality Management (TQM) research effort for Ferguson Enterprises. A multi-phase methodology was employed in an effort to design and develop a benchmark customer satisfaction survey instrument. The initial phase began with conducting focus group research of internal Ferguson personnel who have customer interaction. The purpose of this phase was to determine the customers' vantage point from an internal perspective. The second phase of this research consisted of conducting focus groups with customers. The benchmark customer satisfaction instrument was then developed and pre-tested with customers. After pre-testing and initial analysis, final revisions were made to the instrument and the customer satisfaction survey has now been implemented as a part of Ferguson Enterprises' corporate TQM process.
- Conducted focus group research for Tread Quarters. Groups were conducted with both customers and non-customers. Various advertisements were discussed as well as an exploratory investigation of models of buyer behavior.
- Conducted an analysis and review of an internal employee assessment questionnaire for WLTY, an "oldies" radio station, as a part of their internal Total Quality Management (TQM) process.
- Conducted mystery shopping for Resort Condominiums International. The purpose of this mystery shopping was to determine the extent to which competitors "confused" potential purchasers about what they actually offered in terms of vacation condominium trading times and locations.
- Conducted a central location music listening and preference test for WLTY, Oldies 95.7. Involved in all phases of the study to include participant recruitment, directing the actual test, and analysis of the resultant data. Analyses included clustering the various music hooks into similarity groups. These were later crosshatched with preferences for listener demographics to assist the station in creating its optimum programming mix.
- Conducted a "critical mass" analysis of bank deposits for all counties within seven southeastern states. Bank deposits for all banks within these counties were analyzed to

determine if there was a relationship between number of branches and total deposits for a particular bank. The analysis involved a non-linear modeling of bank deposits and a clustering of banks with similar derived models. The analyses demonstrated that deposits remain linearly related to the number of branch banks until a threshold percentage of market share was reached. At this point deposit share followed a higher order model until a saturation market share was reached. At this asymptotic limit, branch share began to decline following another non-linear model. The results of this investigation provided a model for branch bank expansion at the county level.

- Conducted focus group research for Lynnhaven Lincoln-Mercury. The purpose of these groups was to determine attitudes, interest, and opinions of upscale automotive purchasers as well as gauge reaction to alternative advertising media and executions.
- Conducted intercept surveys for the Virginia Beach Ocean Occasions Wine Festival. The purpose of this research was to determine reasons for attending as well as likes and dislikes of the festival.
- Conducted focus group research for Sentara Health Care's emergency and triage facilities and services. Participants were recent patients of the emergency care facility of Sentara Norfolk General Hospital. Attitudes, interest, and opinions about participants' experiences were sought as well as suggested areas for both short and long term improvement.
- Conducted Factor Analysis and scale development for measuring patient satisfaction with Sentara Norfolk General Hospital's Women Health Pavilion. Although there have been significant numbers of patient satisfactions studies conducted, little in the way of actual scale development has been reported in the literature. Various attitudinal and perceptual methods of scale development were applied to the measurement needs related to a patient satisfaction metric. A scale was developed using both single measures of satisfaction as well as a Likert Summated Attitudinal Scale approach. The scales developed were tested among a represented group of patients. The data which resulted from this trial were submitted to Factor Analytic procedures as well as internal scale consistency techniques to refine the satisfaction scales prior to final questionnaire design.
- Conducted focus groups for Merchant's Tire to better understand motivations and sources of information of tire buyers. TV and print media advertisements were shown and evaluated by the groups.
- Conducted focus group research for S. L. Nusbaum Real estate. The focus of this research was to better understand the process that renters go through when selecting an apartment. The groups were also asked to identify how printed media (e.g., newspapers) were used in the selection process as well as an evaluation and determination of the use of the "Apartment Guide," a S.L. Nusbaum publication which provides detail on many complexes in the Hampton Roads, VA area, in their selection of an apartment.
- Conducted focus group research for Upton's Department Stores. Women who were identified as "frequent shoppers" (shopped Upton's at least once a month), were participants in these focus groups with the objective of determining: perceptual dimensions of retail department stores, buying behavior, and satisfaction with merchandise selection and availability.
- Conducted a market segmentation and evaluation of the southeastern United States counties regarding financial viability and expansion/development potential for NATIONS Bank. The analyses involved a combination of retail trade data, county demographics, Federal Reserve information, and county purchasing power indexes. Both linear and non-linear modeling was imploded to develop profiles of each county. These profiles were then submitted to various hierarchial clustering procedures to determine a set of stable segments. These segments were subsequently the criterion of both linear and non-linear discriminant analyses. The result was a stable set of four county types: Centers of Business (COB) counties demonstrating significant "in-shopping" for all categories of retail and retail banking; Rising Star counties which were taking on the characteristics of COB counties but had not reached a state of autonomy from their mother COBs; Bedroom counties having significant "out-shopping" in certain retail categories including

- banking; and Low Growth Counties which demonstrate a cross temporal stable profile and have little indication of significant change in the near term.
- Conducted a telephone survey of past emergency room patients for Sentara Hampton General Hospital. The purpose of this research was to obtain a statistically projectable measure of patient satisfaction. Various forms of customer satisfaction scales were evaluated prior to developing the final telephone questionnaire.
 - Conducted focus group research for WTAR News and Information Radio (AM 79). The purpose of these groups was to determine the dimensions of competitive format offerings. Both listeners of WTAR and listeners of its primary competitor participated in these groups.
 - Conducted a central location music listening study for COAST Radio (WKOC), a progressive rock station. Two groups of 100 each listened and evaluated 400 music "hooks." The purpose of the groups was to better understand format and music preferences of listeners to assist the radio station in future promotional and programming efforts.
 - Conducted cardiac patient focus group research for Sentara Norfolk General Hospital. Recent cardiac patients of Sentara Norfolk General Hospital participated in these groups. Evaluative as well as choice criteria were examined.
 - Conducted focus group research for Freedom Ford. The service center was the focus of these groups. Attitudes, interest, and opinions, as well as areas of improvement were discussed. Competitive advertising and alternative media were also compared by the groups.
 - Conducted an attitude, interest, and opinion study for the American Power Boat Association. A convenience sample of attendees were interviewed in order to provide race sponsors with demographic, psychographic and buying behavior information. This enabled the APBA to prepare a "profile" of power boat race attendees.
 - Developed the conjoint methodology, procedures, and analysis techniques for the evaluation of physician' judgments of four breakthrough pharmaceuticals for Ortho Pharmaceutical. The research involved a fractional factorial incomplete block design. Judgment samples of innovative physicians were chosen in England, France, Germany, Italy and Belgium. The resulting analyses were used to project market share and cannibalism of existing Ortho products.
 - Performed the analysis for a five country awareness and usage study for a pharmaceutical estrogen-replacement product for Ortho Pharmaceutical. Menopausal women in England, France, Germany, Italy and Belgium were interviewed in order to assess not only if they were aware of and used estrogen replacement products, but to determine their general attitude about menopause and hormone replacement therapy. Cluster analysis was used to categorize the women into segments that were later used for target marketing purposes.
 - Conducted a customer satisfaction review for Spirit Cruises, Inc. The purpose was to measure customer's satisfaction levels with dinner and buffet cruises. Various dimensions of satisfaction were measured as well as relative importance of the dimensions when considering entertainment of this type.
 - Conducted a mall intercept study for Spirit Cruises, Inc. The purpose of this study was to measure general preference for a sit-down dinner versus a buffet style cruise.

Telecommunications Marketing Research and Consulting

- Conducted a focus group study of the documentation usage study of AT&T Network Computer Services (NCS) personnel. This study assessed the way employees currently use documents, their knowledge of controlled documents, how documents are verified, and perceptions about electronic and web-based documentation. Focus groups were held with the on-site workforce in New York, Arlington, VA, Saint Louis, and Chicago; center personnel in Conyers, GA and Denver; and management personnel in Alpharetta, GA and at headquarters in New Jersey.

- Conducted a study on the impact of a common documentation procedure across all process units with AT&T NCS through the use of in-depth interviews.
- Conducted the AT&T International Employment Development Study. The purpose of this study was to assess the training needs of AT&T and NCR employees worldwide. The five regions included in the study were the United States, the Americas region (includes Canada, Mexico, Central and South America), Europe/Mid East/Africa region, and the Asia/Pacific region. This study consisted of two components: in-person interviews with corporate executives and directors; and questionnaires administered to non-managers who attend training within AT&T. Designed and developed the questionnaire instruments for both phases of the research. Also provided interviewer training to the AT&T internal personnel who will be conducting the interviews throughout the world.
- Conducted the annual AT&T Quality Professionals Study in 1992 and 1993. AT&T Quality Professionals and Customers of Quality Professionals were surveyed using a mail methodology in order to assess the overall satisfaction with the role of providing quality services and to evaluate the value of the services themselves. Involved in all aspects of the study from questionnaire design to fieldwork to data analysis. Multivariate techniques, including multiple regression, correlations and factor analysis, were employed in order to measure the associativeness of the data.
- Conducted the 1993 AT&T Corporate Quality Office (CQO) Customer Satisfaction survey. A randomly selected sample of customers of the CQO were surveyed, using a mail methodology, in order to determine both the importance they placed on the services provided by the CQO, as well as their overall satisfaction with each. Involved in all aspects of the study from questionnaire design to fieldwork to data analysis. Multivariate techniques, including multiple regression, correlations and factor analysis, are employed in order to measure the associativeness of the data. Additionally, gap analysis was employed to determine areas for improvement.
- Conducted extensive secondary data analysis and focus groups research to determine the export market potential of the Gulf Coast region. This work was conducted for BellSouth and involved several constituency groups: Gulf Coast exporters, Latin country importers, facilitators, local and national chambers of commerce (both in the U.S. and in Latin countries), and various governmental agencies.
- Conducted focus group research to evaluate directory concepts for BellSouth's greater Atlanta metropolitan area Yellow Pages.
- Conducted the 1991 and 1992 AT&T Customer Satisfaction Review. This survey is administered to AT&T's 1100 largest accounts. The purpose is to measure customer satisfaction with AT&T Network Sales Support. Support included: questionnaire design and development; conduction of fieldwork, analysis of the data; and preparation of the final report for AT&T management personnel.
- Conducted focus group research to evaluate advertising concepts for BellSouth's greater Atlanta metropolitan area Yellow Pages. Both current advertisers and non-advertisers participated in this study. In addition to evaluating Yellow Pages concepts, the groups discussed the various media they used in their advertising efforts, the advantages and disadvantages to each method, and how they made their media selection.
- Conducted mystery shopping of the 800 service and consulting marketplace for AT&T. An investigative analysis and review of AT&T's competitors was conducted in order to assess the services that were being offered to rival existing consultation and training services for the inbound sector.
- Conducted a nationwide focus group study to evaluate a concept for a centralized AT&T 800 Service and support center. Both national and commercial accounts were evaluated in order to assess their receptability to a consolidated center for sales, training, maintenance and billing support for inbound services.
- Conducted a national descriptive study to evaluate the data communications market for T1 DSU/CSU equipment and service needs for AT&T Paradyne. A telephone-fax-mail approach was used in an effort to determine the likely migration of users of current data communications devices to the T1 DSU/CSU. Hierarchical clustering was employed to segment the customer groupings for possible market introduction.

- Developed the conjoint methodology, procedures, and "real time" evaluation tradeoff sets for the understanding of telecom/datacom digital network selection. Due to the complexity of the stimuli sets and the needs of AT&T, the typical stand-alone, self-administered fractional factorial incomplete conjoint design was deemed inappropriate. The methodology utilized laptop computers and "real time" conjoint algorithms for capturing respondent tradeoffs. One hundred respondents were selected from telecom/datacom managers of Fortune 500 companies. The research design permitted individual conjoint modeling. The individual models were grouped together using the Howard-Harris centroid clustering procedure. The resulting groups represented market segments with different market/product motivating stimuli and associated "willingness-to-pay" metrics.
- Conducted an evaluation of presentations for AT&T's Microelectronic Division. Fourteen presentation teams were judged across various attributes and ranked.
- Provided a review and guidance in the area of questionnaire design for AT&T-Paradyne, Inc.
- Conducted focus groups for AT&T to determine satisfaction with SDN services and billing.
- Conducted a monthly tracking and evaluation study for AT&T's BCS group to measure customer satisfaction with AT&T's PBX equipment billing process.
- Conducted focus groups for AT&T to determine advertising concept evaluation and product positioning for the Partner II telephone system.
- Conducted both exploratory and quantitative descriptive research for evaluating and better understanding AT&T's position within the telemarketing industry. A two-tiered interviewing approach was employed. First, telecommunications managers were interviewed to determine total usage of services. Then a network sampling approach was employed in order to reach the telemarketing manager(s) within an organization. These individuals were interviewed to assess their 800 services training and consultation requirements, as well as their definition of "telemarketing."
- Conducted a monthly tracking and evaluation study for AT&T's BCS group regarding industry awareness of AT&T's and competitor's advertising for telecommunication and equipment.
- Conducted focus groups for AT&T to determine the Wireless Communications needs that exist within the nation's top businesses. Focus groups were held with both AT&T and non-AT&T customers. This study involved a general understanding of customers' needs in which a wireless technology might better meet, as well as the presentation and customer reaction to wireless telecom concept beginning developed at Bell Labs. The results of this study gave direction to the further development of the concept, likely customer barriers, specific needs to be met, and initial customer acceptance.
- Conducted a comprehensive study of customers' reactions to and need for the AT&T Detail Manager (ADM), a billing information product. Qualitative interviews were conducted with AT&T customers nationwide in order to assess their billing information needs. A select group of customers who were billed via the Electronic Data Interface (EDI) were also interviewed in order to discern their specific needs. The qualitative research was followed by a descriptive survey in an attempt to project customer requirements to the total AT&T population base. This study resulted in an adaptation of the diffusion process of innovation model. Buyer characteristics, determinants of motivation, and likely adoption timeframe were established.
- Conducted an exploratory analysis of current customers of AT&T's EDI. The study involved in depth interviews of reaction, likes, dislikes, perceptions, and suggestions of product improvement.
- Prepared a case analysis of a newly developed computer assisted billing analysis system. The case evaluated the market viability and target marketing strategy for this product.
- Conducted a comprehensive research for the evaluation of the AT&T MEGACOM billing format. The study required focus groups with AT&T MEGACOM customers. An innovative concept evaluation methodology was developed and utilized. Subsequently, a nationally projectable survey of MEGACOM customers was conducted. Again the design

required a complex concept test of two prototype bills. A pre-notification, concept mailing, and call back survey methodology was utilized. The telephone survey lasted upwards of one hour. An 85% response rate was received.

- Conducted focus groups for AT&T to determine the definition and application of the terms Technology, Technologically Advanced, and Advanced Technology. Groups were held with both AT&T PBX customers as well as customers of competing PBX systems.
- Provided focus group moderator training to AT&T personnel prior to their conducting User Panel research.
- Conducted focus group research for AT&T in evaluating their Private Line customer bill. Groups were held both with internal AT&T personnel as well as with major Private Line Customers.
- Conducted focus groups for AT&T's IMS organization.