CalSAE ELEVATE

Home-Grown Intelligence: Managing in-House Data/Research

WHORTON MARKETING & RESEARCH

Kevin Whorton, Whorton Marketing & Research

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Overview

- With the advent of 'new tools' such as the telephone, computer databases, and inexpensive online survey software, you have all the technology you'll ever need to conduct cost- and time effective research in house.
- We will discuss
  1) How to develop in-house capacity to use simple tools to conduct research.
  2) Choose and implement the right projects. Measure audience satisfaction, assess feasibility of new/improved services or initiatives, diagnose a failed program, and directions … in-depth without spending an extra dime.
  3) Keys to managing your in-house intelligence function—managing tech and human elements of research in a way so you can make data-driven decision-making an affordable capacity that grows over time to the point you won‘t want to make moves without it.

Horror Stories & Extreme Opinions

- "It took us two years to undo the damage caused by how we applied the last study."
- "Conducting research in-house is like performing surgery on yourself."
- "These are very troubling findings. We have to take action <u>now</u>."
- "Thanks! It was interesting. It totally confirmed everything I think about the membership."

Key principles: developing your in-house capabilities

How to Develop In-House Capacity

1. Develop internal skills
2. Manage your audience
3. Practice appropriate methodologies
4. Select/use best online survey tool
5. Teach staff/leaders: read/use results
6. Reduce mistakes over time

#6. Avoiding mistakes

- NOT ignoring your findings
  - So often, research is as “checklist item”
  - Board or calendar dictates, breathe sigh of relief when done
  - Particular risk with in-house/low cost projects
- NOT overreacting
  - Good research often uncovers disgruntlement
  - Get Board/staff to accept, apply constructively
- NOT under-using research as tool
  - Program evaluation should be a core competency
  - Research is a way to get there
  - Ensure that it complements the alternative informal anecdotes, overly detailed reports, social media…

#1. Develop internal skills

- Writing questions
  - Need to *be* objective, define/adhere to objectives
  - Extrapolate from stated need, best practices
  - Build a question bank: library of good asks
- Managing online database tools
  - Important to push your software's capabilities
  - Sensible, fast design: versions, pre-tests, revisions
- Manipulating data
  - Up-front to manage samples from AMS.
  - Back-end to clean data, final reports
  - Control who gets what/how many (i.e. SHRM)
- Analysis & reporting
  - Storytelling/narrative: creative investigation to close loop on overall discovery process

#2: Manage your audience

- Get them in the mood
  - Share results, transparently & candidly
  - Demonstrate a link between knowing & acting
- Explain why you're asking for each project
  - Encourage them to ask <u>you</u> questions
  - Welcome their feedback & scope creep
- Filtering
  - Some projects should be specific to a subgroup
- Segmentation/personalization
  - Use variable copy to bucket/version
  - Ensure research is a direct/ targeted dialogue
- Scope
  - Keep a base of non-members: customers, inquire, formers, stakeholders/significant others

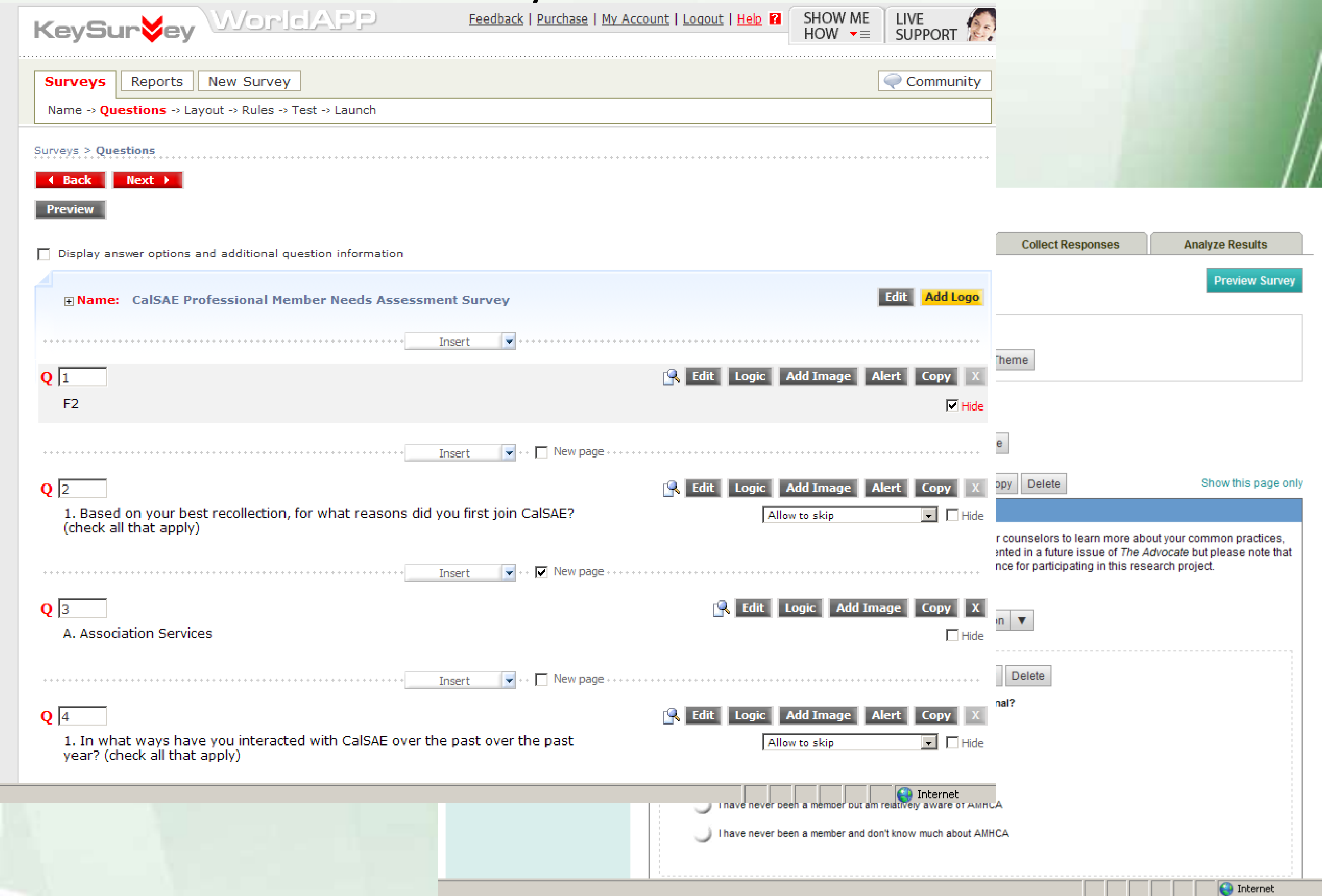
#3. Practice appropriate methodologies

- Research includes secondary & primary
  - Environmental scans, competitive analysis, data mining, what-if projections/scenarios, memos, old survey reports, SM/web intelligence
  - Primary qualitative: focus groups and interviews
  - Primary quantitative: online, phone, mail, fax surveys
- Know when to choose one or more
  - Qual: typically do pre-quant for issue identification
  - Qual: best for exploratory, open-ended problems
  - Quant: best tool to test hypotheses, definitively measure things
  - Qual & Quant: helpful to mix how & why
    mix dialogue with monologue
  - Quantitative: don’t avoid using fax, phone, or mail to push use of online (avoid disenfranchising)

Telephone polling & interviews

- Important/overlooked source of intelligence
  - Low/no cost, quickest to field, report
  - Often interviews=more candor than F2F
  - Convenience means less biased than focus groups at conferences/events (AKA ‘pooled enthusiasts’)
- Common formats
  - 15-minute pre-schedule discussion: email/fax recruit
  - Speak to enough people: convergence @ 15-30 conversations
- Listen for
  - Normal language/jargon, emotive content, ‘digressions’
  - Loosely follow a guide, use probes to get at issues if mentioned
  - Seek to listen supportively, without defensive reactions

#4: Select/use best online tool



Choosing the online tool

- Evaluation methods
  - Try demos but implementation=true test
  - You’ll grow in or out of your choice
- What I look for
  - Some but not too much design flexibility
    - Sufficient variety of response devices (matrix, numeric allocations)
    - Easy versioning for pre-tests
    - Easy to use: ‘60 minute/21 year old’ criteria
  - Reliable push & personalization/collectors
  - Sufficient back end analysis
    - Easy progress checks during fieldwork
    - Easy downloads, basic internal reporting (counts rather than graphics)

How to maximize participation

- Avoid asking the same questions over and over
  - Learn to do overlays of demographics (software or after the fact)
  - Use filter/cross-tab feature to measure response by segment, link responses to one question & another (causality)
- Identify/address signs/sources of bias
  - Low response rate often doesn't matter but ensure adequate representation of segments
  - New members, passive/unengaged, larger companies=low responders
  - Don't over-survey or get lazy on filtering/segmentation
- Use campaign management, effective appeal language to boost response
  - "10/5/0/-5" timing; deadline extensions
  - Employ both logic & emotion in invitation/reminders
  - Use address book/followup non-respondents only while protecting confidentiality
- Same rules apply to qualitative as quantitative: engagement, sincerity, focus, action, communication

#5: Teaching your internal users

- In a traditional feedback loop:
  - Begin with an end in mind
  - Plan/test, implement/rollout, examine/report, modify/revise. Repeat endlessly
  - Research is one of the assessment tools
- For any of our problems … feasibility, post-mortem, measure needs, industry conditions
  - Our ‘internal clients’ will be imperfect
  - Extremes: over-reaction or ignoring findings
  - Over time: risk of complacency/indifference
- Keys: finding a champion
  - Someone each year/project who knows
    - It’s best available data
    - Accepts findings without knowing the exact cause
    - Remembers previous studies & builds knowledge

Decisions: internal research function

- Centralized or decentralized
  - Service bureau/distributed access-common tools
- Selective outsourcing
  - Need to use external help on a few projects?
  - Basic training for software chosen
- Building expertise
  - Small library of texts: Sage, Dillman
  - Using survey software firm guides/help/resources
  - Online forums (AMA research), websites (Quirks)
- Introduction/permission from Board
  - Encouraging them to value the tool, make data-driven decisions ingrained in culture

Benefits of internal research function

- Unparalleled access & market knowledge
  - Members know & trust you, easy fieldwork
  - License to ask good questions if used wisely
- Exploit a market advantage
  - Lower cost of production=more, right studies
  - Basic training for software chosen
- Improve your decision support
  - Better data typically=better decisions
  - Better/more robust guidance than Board offers
  - Be able to distinguish between the lone gunman & the tip of the iceberg

Key principles:
choose & implement the right projects

Research program: portfolio of projects

Active surveys on top

Response rate

CTR

Move ▾ Delete

Survey						Completed	Incomplete
Association Outsourcing Practices/Satisfaction Survey		Edit	Launch	Report		61	3505
The Johns Hopkins University Press Survey		Edit	Launch	Report		77	67
CalSAE Professional Member Needs Assessment Survey		Edit	Launch	Report		197	398
CalSAE Associate Member Needs Assessment Survey		Edit	Launch	Report		149	377
SIGMA Mobile Refueler February 2011 KPI Benchmarking		Edit	Launch	Report		1	0
SIGMA 2011 Statistical Survey.		Edit	Launch	Report		45	214
NACE State of the Industry Survey		Edit	Launch	Report		174	13894
A.S.P.E.N. Membership Survey of Professional Needs		Edit	Launch	Report		1371	4725
SHRM Member Engagement Survey		Edit	Launch	Report		0	0
SHRM Chapter Leader Survey		Edit	Launch	Report		0	0
ASCP 2011 Student Membership Survey		Edit	Launch	Report		248	3367
FDLI Membership Survey		Edit	Launch	Report		448	5586
FDLI Membership Survey-Pretest		Edit	Launch	Report		14	27
SIGMA Mobile Refueler January 2011 KPI Benchmarking		Edit	Launch	Report		1	0
SIGMA Mobile Refueler 2010 Year End KPI Benchmarking Study		Edit	Launch	Report		6	25

What would your ‘portfolio’ look like?

- What kinds of problems do you have?
  - What problems have you had? (that went unexplained)
  - What problems might/will you have?

- In what way are/can they become research problems?
  - How would you go about it, conceptually & operationally?

Illustrations/Scenarios

A. Feasibility

B. General Needs Assessment

C. Single-Topic Studies

D. Post-Mortem

A) Logical questions to ask: feasibility

- Introduction:
    - We are considering a new xx service to address yy issue. We need your help.
- Core questions
    - Statement of need/relevance
        - How often do you encounter yy today?
        - How do you address the need that xx would meet today?
    - Estimating the benefit
        - What is the cost of yy in terms of foregone revenue, lost employee productivity, compliance costs, etc.?
    - Estimating value
        - How much would it be worth to address this issue?
    - Projecting use/evaluating alternative approaches
        - Which would you use if offered: training program, more aggressive grassroots activity, an online forum, a subscription series, a special website (one, many, or all)
        - What objections or concerns do you have?
    - Process/engagement
        - Would you be willing to serve on an ad hoc task force or be willing to beta-test/evaluate later?

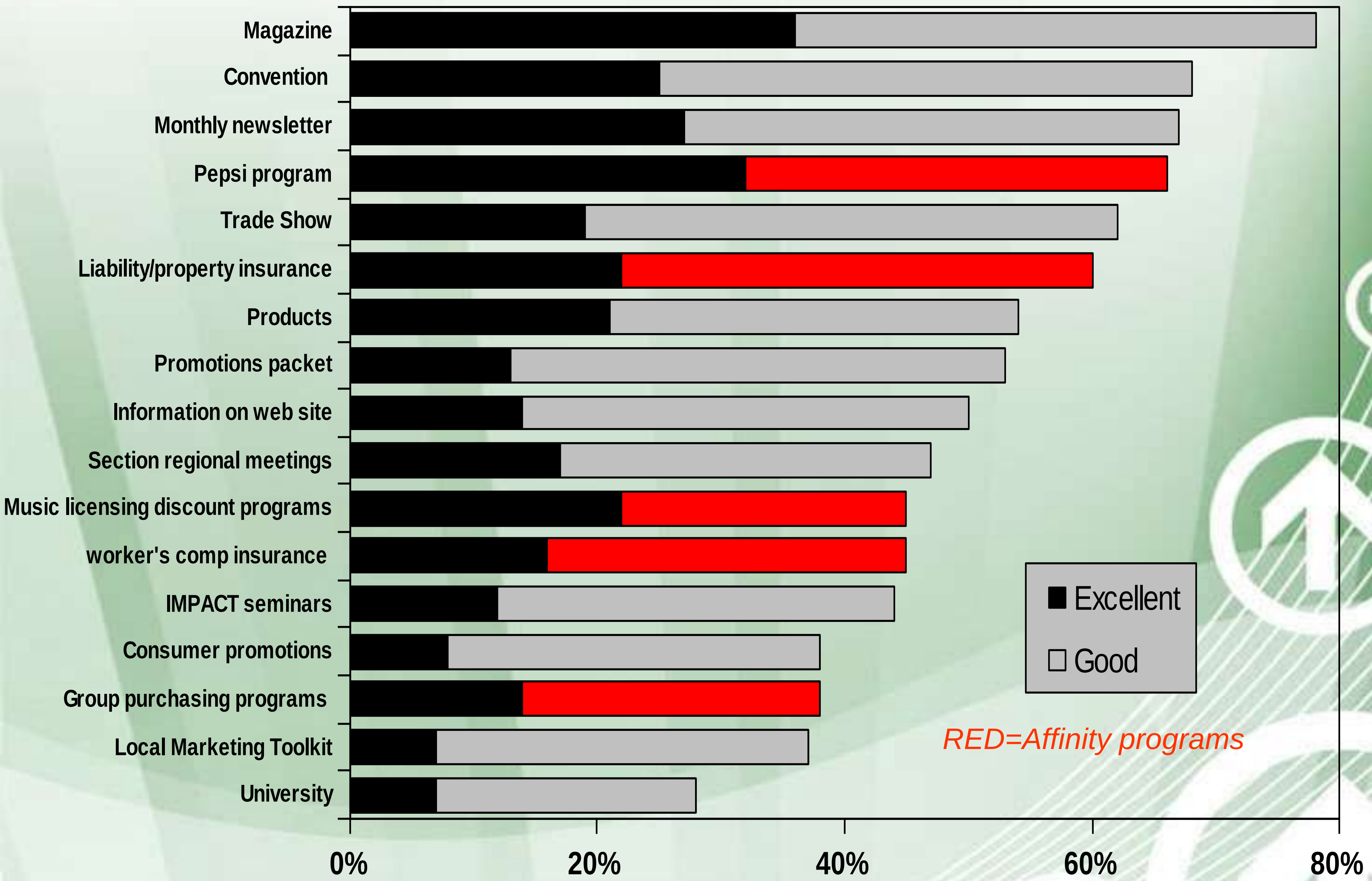
How do we interpret findings? (feasibility)

- Possible findings, what they'd mean
  - 40% have HR screening issues today: bad hires, liability
  - Another 25% have symptoms, don't recognize it yet
  - 20% with problem are comfortable with internal solutions
  - 3 respondents identified unique external providers
  - The average cost/bad hire=$2,500 & average=12
  - Base on foregone revenue: can't measure lost productivity
  - Many familiar with a famous compliance case
  - Estimated value of association services:
    training $450 +/- $125, conditioned on what they pay now
  - Alternative services run 20% to 30% higher cost
  - Members prefer association does grassroots & forum:
    skip the subscription, refer them to an existing website
  - Biggest objections: issue lies in association's purview, but commercial solutions not seen as core competency
  - 20% very, 35% somewhat likely, 35% uncertain, 10% definitely would not use a training program
  - Results vary sharply by segments within membership
  - Many willing to advise now

B) Questions to ask: global needs assessment

- Needs to provide answers to key questions
  - Behavior: what/how much use, read, visit?
  - Importance/satisfaction: gap analysis
  - Priorities: what audience cares about most/least
  - Tangible benefits/intangibles (culture, image)
  - Contribution of each service to overall value
  - Communications, education preferences
- Focus on both members *and* non-members
  - Non-members have well-defined opinions also
  - 80% retention=20% each year new (if lucky!) so non-members are tomorrow's members
  - Non-member population often includes former members, others with meaningful exposure
- Consider alternatives to the mega-survey
  - Serialized studies or panels that link responses to an individual over time

Analysis & interpretation: program performance



Programs/benefits management

Illustration of benefits mix

Small Trade Association: core benefits

- **RSA Convention**
- **RSA Trade Show**
- ***IMPACT seminars***
- ***RSA University***
- Consumer promotions/Local Marketing Toolkit*
- **Pepsi program**
- ***Promotions packet***
- **RSA magazine**
- ***RSA Today*** **monthly newsletter**
- **RSA Section regional meetings**
- **Web Information**
- **RSA worker's comp insurance***
- **RSA liability/property insurance***
- **Music licensing discount progra**
- **Group purchasing programs***
- **RSA products**

* potential golden handcuff

xxx: potential core/sunset

Note: member usage, perceptions = distinction between potential and actual

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Pennsylvania Institute of Certified Public Accountants

MEMBERSHIP APPLICATION

Apply for Membership Online at www.picpa.org

1650 Arch Street, 17th Floor, Philadelphia, PA 19103
Membership Relations Hotline (267) 675-6240
(888) 272-2001 • Fax (215) 496-9712
info@picpa.org • www.picpa.org

Personal Information*

*Required items

Print name as you wish it to appear on your membership certificate (issued to Active and Non-Resident members only)

☐ Mr. ☐ Ms. ☐ Mrs. ☐ Other ______ (Jr., Sr., III, etc.) ______

Name: First* ______ Middle ______ Last* ______

Date of Birth: ______ **Nickname:** (e.g. "Bob") ______

Spouse's Name: ______

Home Address*: Street ______

City ______ State ______ Zip ______

Home Phone: (____) ______ **E-mail:** ______

Were you referred by a Member? If so, Who? ______

Business Information

Name of Firm or Organization: ______

Business Address: Street ______

City ______ State ______ Zip ______

General Business Phone: (____) ______ **Business Fax:** (____) ______

By signing below, I hereby consent to receive faxes sent by or on behalf of the following companies to the fax number listed above: PICPA, PICPA Foundation for Education and Research, CPA-PAC, PICPA Insurance Trust, PICPA Scholarship Fund

Signature ______ Date ______

Direct Business Phone or Extension: (____) ______

Please indicate address to be used for PICPA mail: ☐ Home ☐ Business

Organization Type: ☐ **Public Accounting Firm:** ☐ Individual ☐ Local ☐ Regional ☐ National
☐ **General Industry: General Industry Description** (see reverse) ______

Type of Business: ☐ Publicly-Held Company ☐ Not-for-Profit ☐ Privately-Held Company ☐ Government

Revenue Size: ☐ less than $10 million ☐ $10-50 million ☐ $51-500 million ☐ over $500 million

Position Category Code (see reverse) ______

Area of Interest Codes: (see reverse)
1. ______ 2. ______ 3. ______ 4. ______

Does your employer reimburse/pay for membership? ☐ Yes ☐ No

Payment Information

Fiscal Year runs May 1 to April 30

Method of Payment:
☐ Check enclosed (payable to PICPA)
☐ VISA ☐ MasterCard ☐ American Express

Account No. ______

Exp. Date ______

Enclosed is payment of
$ ______

Applicant's Statement: To the best of my knowledge and belief the information contained herein is true and correct. I agree to abide by the ultimate decision of the secretary or his/her designee as to the disposition of this application. If elected to membership, I agree to be governed by the Charter, Bylaws, and Code of Professional Conduct of the Pennsylvania Institute of Certified Public Accountants.

Signature ______

Date ______

Join Today! Return your complete application with payment to one of the following:

Web: www.picpa.org**
Fax: 215-496-9712**
**credit card only

Mail: Pennsylvania Institute of CPAs
Box 510533
Philadelphia, PA 19175-0533

Membership Type*

Refer to reverse side to determine the appropriate member classification and dues rate.

CPA Membership (voting members):
☐ Active ☐ Active-Educator ☐ Non-Resident

Non-CPA Membership (non-voting members):
☐ Candidate for Admission ☐ Accounting Affiliate

If applying for Accounting Affiliate, please list your date of graduation: ______

☐ Associate* ☐ Associate-Educator*

Associate member applicants other than Non-CPA full time educators, must be sponsored by a PICPA Active member and sponsorship must be renewed annually. Non-CPA educators must provide confirmation of college or university affiliation. For a complete definition and list of requirements see reverse side.

***Sponsorship:**
Sponsor's Statement for Associate Membership Only
To the best of my knowledge and belief the above applicant meets the criteria for Associate membership as outlined by PICPA. As an Active Member of PICPA I hereby sponsor the applicant to become a PICPA Associate member for the current fiscal year (May 1 to April 30).

Sponsor's Name ______
Member No. ______
Date ______

Certification Information*

Do you hold a Pennsylvania CPA Certificate?
☐ Yes ☐ No

PA Certificate Number: ______

Certification Date: ______

Original Certification (if other than Pennsylvania):

State or Country ______

Certificate Number ______

Certification Date ______

CPA Exam Date: ______

Have you ever been a member of PICPA before?
☐ Yes ☐ No *(If yes, see reverse for reinstatement information.)*

Has any CPA certificate or substantial equivalent thereof, ever been suspended or revoked?
☐ Yes ☐ No *(If yes, give details on separate sheet.)*

Are you a member of the AICPA? ☐ Yes ☐ No

Priority Code: ______

FOR OFFICE USE
Member Number: ______
Admission Date: ______
Member Type: ______

Membership Types and Dues Rates*

CPA MEMBERSHIP

Active Member
Fee: Held CPA license 5 years or less – $190
Held CPA license more than 5 years – $265

Any person who is a certified public accountant (CPA) of Pennsylvania, another state or political subdivision of the U.S., or the equivalent of a CPA of a foreign country, or its political subdivision.

Active – Educator
Fee: $115

Any person who is a certified public accountant (CPA) of Pennsylvania, another state or political subdivision of the U.S., or the equivalent of a CPA of a foreign country, or its political subdivision and is engaged in accounting education on a full-time basis in an accredited college or university.

Non-Resident Member
Fee: Held CPA license 5 years or less – $115
Held CPA license more than 5 years – $130

Certified public accountants of Pennsylvania who neither reside nor are employed in Pennsylvania.

*Dues rates are subject to change after Fiscal Year End, April 30.

Applications: All applications for membership shall be submitted to the Secretary, or his/her designee, who shall determine the eligibility of the applicant for membership.

Each application for membership shall be accompanied by a remittance of the appropriate dues for the applicable class of membership, which remittance shall (a) be returned in the event of the rejection of the applicant, and (b) in the event of the acceptance of the applicant to membership become payment of the applicant's dues for the period of time designated within the applicant's acceptance letter. Applications are processed monthly.

Reinstatements: Former members, please note. Applications for reinstatement must be submitted with dues for the year in which reinstatement becomes effective. Members who were terminated for non-payment of dues must add a reinstatement fee of $50 to the current dues rate for your membership type, and may be subject to additional sums due to the Institute at the time of his/her termination. Former members who resigned in good standing are not required to pay the reinstatement fee.

Dues: Each member's dues shall be determined on the basis of his status as of May 1 of each year. In the case of a member whose status is more than one category, the rate of dues shall be the one applicable to his/her principal activity. A portion of your membership dues is allocated to your subscription to the *Pennsylvania CPA Journal* each fiscal year.

NON-CPA MEMBERSHIP

Accounting Affiliate
Fee: $25

Any person who has graduated from an accredited four-year college or university with an undergraduate or graduate degree in accounting (or a related field). Eligibility is limited to four years after his/her graduation.

Candidate for Admission
Fee: $115

Any person who resides or is employed in Pennsylvania, and who has passed the entire written CPA exam in any state or political subdivision, but has not met the experience requirement.

Associate
Fee: PICPA Member 5 years or less – $190 Educator – $115
PICPA Member more than 5 years – $265

Any individual who:
- Is an owner or professional employee of a licensed CPA firm or sole practitioner ***or***
- Works under the direct supervision of PICPA CPA member in industry or government ***or***
- Is engaged in accounting education on a full time basis in an accredited college or university in Pennsylvania ***and***
- Is **not** a certified public accountant

Specific education and work experience achievements include:
- Baccalaureate degree from an accredited college or university
- Two years experience serving clients in public accounting or internal clients in industry or government and is actively involved in a role supporting CPAs in their professional responsibilities.
- Applicants other than educators engaged in accounting education on a full time basis, must be sponsored by a PICPA Active member and sponsorship must be renewed annually.
- Educators must provide confirmation of college or university affiliation.

Dues are not deductible as a charitable contribution but may be deductible as an ordinary and necessary business expense. However, the portion of the dues can be attributed to activities defined by the Internal Revenue Service as "lobbying expenses," are not deductible. PICPA has determined that 10% of your dues are not deductible for income tax purposes.

Codes and Categories

General Industry Descriptions

Agribusiness	AG	Distribution	DI	Healthcare	HE	Other	OT	Service	SE
Apparel	AP	Employee Benefit Plans	EB	Hospitality/Recreation	HO	Professional Services	PS	State CPA Society	SS
Advertising/Pub Relations	AR	Educational Institution	EI	Insurance	IN	Publishing/Printing	PU	Technology	TE
Casino	CA	Engineering/Architecture	EN	Internet Products/Services	IP	Retirement Ctr/Nursing Home	RC	Telecommunications	TL
Construction	CN	Financial Institution	FI	Leasing	LE	Real Estate	RE	Utilities	UT
Communications/Media	CO	Franchiser	FR	Legal	LG	Restaurant	RS	Wholesale	WH
Consulting	CS	Financial Services	FS	Manufacturing	MA	Retail/Trade	RT		
Credit Union	CU	Government	GO	Not-for-Profit	NO	School District	SD		

Position Category Code

Accountant	AC	Chief Operating Officer	CH	Managing Partner/Shareholder	MP	Secretary	SC	Unaffiliated	UN
Analyst/Consultant	AN	Chief Information Officer	CI	Other	OT	Student	SD	Vice President	VP
Attorney	AT	Controller	CN	Professor/Asst.Prof/Instructor	PR	Senior	SE		
Auditor	AU	Director	DR	President	PS	Staff	ST		
Chief Executive Officer	CE	Individual Practitioner	IP	Partner/Shareholder/Principal	PT	Supervisor	SU		
Chief Financial Officer	CF	Manager	MG	Retired	RT	Treasurer	TR		

Area of Interest Codes

Accounting & Auditing	AA	Elder Care	EC	Healthcare & Medical Services	HM	Not-for-Profit	NP	Retail Trade	RT
Assurance Services	AS	Financial/Estate Planning	EP	Human Resources	HR	Operations	OP	School Districts	SD
Business Valuations	BV	Financial Institutions	FI	Internal Auditing	IA	Personal Development	PD	State & Local Tax	SL
Cost Accounting	CA	Forensic & Litigation Services	FL	Investments/Asset Management	IM	Performance Measurement	PE	SEC Practice	SP
Cash Management	CM	Fraud	FR	Insurance	IS	Practice Management	PM	Strategic Planning	ST
Construction	CO	Financial Statements & Analysis	FS	International	IT	Real Estate	RE	Technology	TE
E-Commerce	E-	Federal Tax	FT	Mergers/Acquisitions	ME	Retirement & Investment Planning	RI	Treasury	TR
Employee Benefits	EB	Government	GO	Manufacturing	MN				

Some of my favorite questions ever

4. Based on your impressions, please indicate your level of agreement with each statement regarding AWEA.

	Strongly Agree	Somewhat Agree	Neither Agree nor Disagree	Somewhat Disagree	Strongly Disagree	No Opinion
AWEA advocacy positions represent the needs of the overall wind energy industry	○	○	○	○	○	○
AWEA represents our specific type of company very well	○	○	○	○	○	○
AWEA takes and supports positions that are best for the interests and future growth of wind energy	○	○	○	○	○	○
AWEA offers a wide range of services to our company	○	○	○	○	○	○
AWEA membership is a good v						
AWEA staff is responsive						

1. Which best describes your company's relationship with AWEA today?

- ○ Former member
- ○ Never a member but active in AWEA programs
- ○ Never member/not active

2. For which reasons would your company consider becoming a member of AWEA today? *(check all that apply)*

- ☐ Education and professional development/training opportunities
- ☐ General networking opportunities
- ☐ General marketing/business development/customer client opportunities
- ☐ Legislative activities on behalf of the industry
- ☐ Regulatory (transmission/siting/safety) activities on behalf of the industry
- ☐ Public affairs/outreach activities to raise industry awareness & advance our positions
- ☐ To participate in conference/trade shows at a discount
- ☐ To gain access to specialized industry research and data
- ☐ To maintain/increase our company's visibility within the industry
- ☐ To have access to books, publications, and conference materials
- ☐ To generally stay up to date on market trends
- ☐ To support the wind energy industry
- ☐ None of the above/no opinion
- ☐ Other *(specify)* ____

Non-members:

1. Matrix of perceptions
2. Laundry list of experiences, usage and touches.

Favorite questions

12. In what other national or international associations do you currently hold membership? *(use control-click in the drop down menu to indicate multiple responses)*

Please select one or more ...
American Society of Nutrition (ASN)
American Society of Health-System Pharmacists (ASHP)
European Society of Parenteral and Enteral Nutrition (ESPEN)
Society of Critical Care Medicine (SCCM)
American Association of Critical Care Nurses (AACCN)
American Gastroenterology Association (AGA)
American Society of Gastrointestinal Endoscopy (ASGE)
National Home Infusion Association (NHIA)
American Dietetic Association (ADA)
The Obesity Society
Dietitians in Nutrition Support
American Nursing Association (ANA)
None
Othe

Members: 1. What you belong to

2. Jim's ultimate question/net promoter score

3. Perceived value exercise

7. How likely would you to be to recommend CalSAE membership to a colleague or peer who is considering a professional association?

Extremely likely (10)	9	8	7	6	5	4	3	2	Not at all likely (1)
○	○	○	○	○	○	○	○	○	○

Considering the value of what you receive as a member, what proportion of the total value from SHRM (including National and/or chapter) falls into each of the following categories? ***(Please respond so your answer totals to 100%. Refer to info button for description of categories.)***

Networking	
Professional Advocacy	
Publications/Communications	
Professional Development/Education	
Career Resources	
On-demand Information & Resources	
Recognition/Prestige	
All Other Benefits combined	
Total	

Moooooore favorite questions

1. Top of mind comparison/competitive intelligence 2. Aided recall (readership)

What professional, scientific, or trade association do you regard as the best organization for each of the following categories of service?

	FDLI	No Preference	Other Organization *(specify)*
Quality education and training			
Journals/publications for my field			
Regulations/legislation			
Timely news and information			
Providing professional networking			

For the most recent issue of *FDLI Update* (January/February 2011), please indicate whether you recall reading each article/feature and how relevant the article is to your professional interests (regardless of whether you have read it yet):

	Recall: Read it	Saw but Didn't Read	Haven't Seen	Relevance
Articles New Requirements in Recent FTC Food and Dietary Supplement Orders				Very Relevant (5) / 4 / 3 / 2 / Not at all Relevant (1)
FOP-More Alphabet Soup for Food Labels?				
New Green Guides Lay Out Rules for Environmental Marketing				
Digital Edition Enforcement Corner				
Disentangling Biobetters				
Effective Way to Quantify Safety				
Social Media and FDA				
Features Letters: FDLI President & CEO, editor, and volunteer				
New Requirements in Recent FTC Food and Dietary Supplement Orders				
FDLI News: When Congress Comes Knocking, Bounds of FTC Regulation				
Columns: Global, Associate, Student, and Member Corners				
FDLI Notes: Events Calendar, New Members, Index				

C) Areas of questioning: single-topic studies

- **Readership**: recall, relevance, length/depth read, receive-read lag time, importance & satisfaction, pass-on rate, format preferences, preferred topics, other pubs/media used, why not read.
- **Education**: frequency of attendance (yours and others), satisfaction, F2F web preferences, session length, recency of adoption, reasonable price, travel issues, preferred locations, best provider top-of-mind, topics, probable future intent, reasons for not attending.
- **New members**: how learned, expectations, future intentions (engagement & retention), interest in volunteering, mentor/mentee, service awareness, opinions on key association issues.
- **Business/employment outlook**: reactions to economy, current profitability, expense categories, recent trend in revenue/customers/income, anticipated future trends, desired assn assistance.

D) Post Mortems

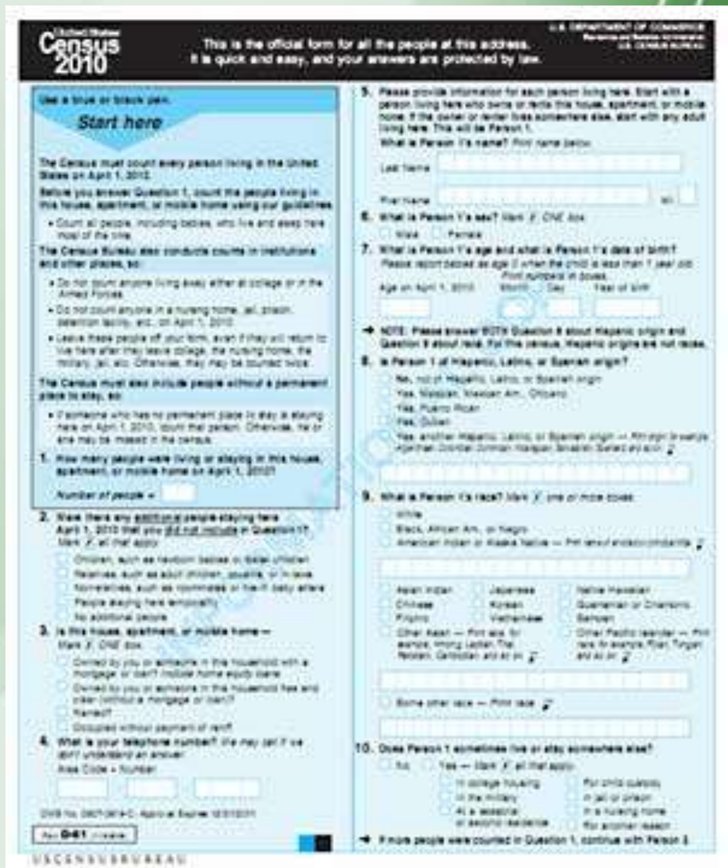
- How to investigate things that suck(ed)
  - Is membership tanking due to inadequate/ poor bundle of services or value proposition?
  - Has attendance at recent conferences been subpar, declining or below expectations?
  - Are well-placed members complaining about things?
- Sensitive topics require more sensitive approaches
  - Use interviews not focus groups, avoid polarizing
  - Be firm, sometimes opaque in approach
  - More ‘objective’ reporting to keep emotions out of it
  - Some issues do have winner & losers
  - Avoidance rarely trumps knowledge & enlightened self-interest

Key approaches: post mortems

- Ask members what they thought of xx
  - Non-committal, no witch hunt, perhaps not identifiable
  - This may be the one time to be opaque
- Address the endemic problems
  - Some issues are one-time disasters
  - Most are icebergs waiting to happen;
    it ‘takes a village’ and years to get there
  - Learn to avoid making same mistake twice
  - Work on the long-term issues: progressive revenue enhancement
  - Visionary strategic planning
  - Ensuring data about the past can
    be projected into the future
  - Member perceptions are shockingly slow
    to change: transgressions are remembered
  - Goodwill also has a long shelf-life

Bonus Round: If it's 9:45 & I see this slide…

- "The death of surveys" (Jeff)
- Rolling intelligence systems (panels)
- Premiums & paying for respondents
- Typical deliverables & reports
- Re-mining: no such thing as old data
- The dynamics of chapter structures & CA as unique large state/culture
- Umm, ask about the weather



Thanks!

Kevin Whorton
Whorton Marketing & Research:
Bethesda MD
(soon, Roseburg OR)
301-312-8938
email: info@kwhorton.com
web: www.kwhorton.com
twitter: kpwhorton