MRIA Comprehensive Marketing Research Exam Study Guide

Marketing Research and Intelligence Association
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Acknowledgements

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Overview

This guide was developed to assist candidates with their preparation for the MRIA's Comprehensive Marketing Research Exam (CMRE). It is organized into four major sections, each of which is described briefly below:

Section A: "About the CMRP and CMRE" provides background on the CMRP and CMRE and describes the goal of the CMRE. It also describes the process by which the exam is set and administered and the requirements for writing the exam.

Section B: "Preparing for the Exam" provides information on how to study. It expands on the subject areas covered in the core courses and provides a series of questions that will help guide your study and ensure that you have sufficient knowledge to successfully pass the CMRE.

Section C: "Writing the Exam" provides additional background on what you should expect on exam day. More importantly, it provides a list of exam writing strategies that are essential reading for candidates who have not recently written an exam. For many candidates who already have good experience in marketing research, this is likely the most important section. The use of good exam writing strategies can have a significant impact on a candidate's grade.

Section D: "Are You Ready?" presents questions in the same style as you will see on the exam. These questions serve as a good test of whether you are ready to write the exam.

A. About the CMRP and CMRE

The CMRP (Certified Marketing Research Professional designation) or PARM (Professionnel agréé en recherche marketing) was introduced to further the MRIA's goal of raising the level of professionalism within the marketing research industry. The CMRP accredits the knowledge of experienced marketing research professionals and establishes a career path for new researchers entering the profession. The CMRP designation is granted to those members who demonstrate that they have the required skills to practice as a marketing research professional. The Comprehensive Marketing Research Exam (or CMRE) is the primary way the MRIA assesses a member's ability to practice marketing research. Passing the CMRE is one of the requirements for obtaining the CMRP designation.

CMRPs are expected to have both the academic knowledge and the professional experience to practice in the field of research. The CMRE, therefore, focuses on testing a candidate's ability to apply marketing research skills in practice. It focuses on the issues and problems a practitioner will likely face in day to day practice.

This section:
- provides an overview of the process by which the exam is set and administered;
- describes the purpose of the exam and what it aims to test;
- outlines the criteria that must be met to be eligible to write the exam; and
- outlines the Maintenance of Certification program.

A.1 How the Exam is Set and Administered

The CMRE is set twice a year by the Dean of MRIA's Institute for Professional Development and approved by the Certification Advisory Committee. The Certification Advisory Committee comprises the Chair of the Professional Development and Certification portfolio, four senior CMRPs and the Manager, Professional Development and Certification. The Committee is chaired by the Dean.

Exams are initially graded by paid markers, however, papers that are within 10% of a pass or a fail are reviewed by the Certification Advisory Committee and a consensus is reached to determine whether the candidates pass or fail one or both sections of the exam. The Certification Advisory Committee is also responsible for responding to appeals.

The names of the exam writers are never disclosed to the exam markers, the Certification Advisory Committee, the Dean, or the Portfolio Chair. Only the education portfolio office staff knows the names of the exam writers and provides the results to candidates. The only identification that appears on submitted papers is a candidate number. Anonymity of the candidate provides an additional level of fairness and independence to the grading process.

When the results are released to the individual candidates, the names of all individuals who passed the exam will be published on the MRIA website and recognized at the Annual Conference. Individuals who are not successful will be notified by the office staff, but their names will not be published.

All individuals involved in administering the exam including the Certification Advisory Committee, the proctors and the markers are all required to sign a confidentiality agreement.

A.1.1 CMRE Structure

The examination includes the following types of questions:

- Part A: Marketing research proposal in response to a specific case study.
- Part B: 20 to 25 single subject and multi subject short essay type questions.

Candidates have 3.5 hours to write each part.

Part A is written in the morning of day one and Part B is written the morning of the next day.

The passing mark for each paper is 65%; both sections must receive at least 65% to pass the exam. Candidates who fail the CMRE must successfully rewrite both sections at a later date if they wish to obtain the CMRP designation, unless they have received a mark of 80% or higher for the other section. In such instance, they will be allowed to rewrite only the failed section.

A.2 What the CMRE Tests

The focus of the CMRE is on testing a candidate's ability to apply their marketing research knowledge and skills to real world situations. This means that candidates must not only understand the theory but also have a solid understanding of how this theory is used in practice.

Marketing Researchers must exercise certain core competencies in performing professional work. **These competencies are described in the *Core Curriculum Competency Requirements* document**[1]. The CMRE tests the candidate's ability to demonstrate the following interrelated skills:

1. apply the knowledge specified in the subject areas covered in the *Core Curriculum Competency Requirements* document;
2. identify, define and rank problems and issues even when not explicitly directed to them;
3. analyze information;
4. address problems in an integrative manner;
5. exercise professional judgment;
6. evaluate alternatives and propose practical solutions that respond to the users' needs; and
7. communicate clearly and effectively.

[1] The Competency Requirements document can be found at the following URL on MRIA's website: http://mria-arim.ca/education/cmre/related-documents.

Candidates must also possess the ability to complete all of the above under the prescribed time constraints.

A.2.1 Application of Core Knowledge

The CMRE consists of a series of questions designed primarily to simulate assignments that Marketing Researchers encounter in professional practice. Accordingly, the CMRE evaluates the ability of candidates to draw upon relevant core knowledge and to apply that knowledge to the specific facts and requirements presented in each question. **Responding solely with memorized information is not sufficient to constitute a satisfactory professional response.**

Questions are selected for the exam to ensure that they cover all the key areas of research in a balanced way. These areas include:

- professional practice,
- marketing research design,
- statistical methods for marketing research,
- questionnaire design,
- qualitative marketing research,
- marketing intelligence/competitive intelligence, and
- marketing management.

Please consult the *Core Curriculum Competency Requirements* document and sub-section B.4 of this *Study Guide* for more details.

A.2.2 Identification of Issues

In identifying, defining and ranking problems and issues, candidates are required to take the following factors into account:

- the specific facts and other information explicitly or implicitly presented in the question;
- the stated and underlying requirements of the question; and
- the users' explicit and implicit needs.

A.2.3 Analysis

Analysis is defined in general terms as the ability to break something down into its component parts. In critically analyzing problem situations that may be encountered in the CMRE, candidates are expected, as necessary, to be able to:

- distinguish between facts and opinions;
- identify cause-and-effect relationships;
- make logical inferences;
- identify relevant assumptions and underlying conclusions;
- identify limitations of given information; and
- distinguish relevant from irrelevant information and reliable from unreliable information.

In some CMRE questions the problems or issues posed may be implicit, rather than explicit. In these cases, candidates will have to analyze the qualitative and quantitative information given in order to identify, define or diagnose the problems embedded in the question.

There is no necessary relationship between the depth of analysis and the type of question (comprehensive, multi-subject, or single-subject). Given the content and requirements of the question, candidates are expected to do as much analysis as is necessary to provide a professional response.

A.2.4 Integration

Integration may be defined in general terms to mean the forming or combining of parts into a whole, or the viewing of the parts of something as a whole. In the context of CMRE, integration has two distinct but interrelated implications: integration of knowledge and integration of issues.

The CMRE emphasizes the integration of knowledge from more than one subject area or topic. Candidates are required to combine knowledge of topics from different subject areas, or knowledge of different topics within the same subject area, and apply that knowledge as a whole to the solution of problems.

Integration in response to CMRE questions, however, goes beyond the integration of knowledge from more than one subject area or topic. As stated earlier, CMRE questions are designed to simulate assignments that Marketing Researchers encounter in professional practice. So as with real problems, candidates should consider that each question may contain a number of issues that must be examined in relation to one another and as a whole.

A.2.5 Professional Judgment

Judgment can generally be defined as the process of making a choice or decision leading to action. Professional judgment is judgment exercised within a framework provided by applicable professional standards and involves the following:

- a meaningful choice;
- a process from perceiving the problem to making the decision;
- expertise, due care, and professional objectivity; and
- recognition of situations where referral to specialist is appropriate.

Candidates are expected to exercise professional judgment to the extent appropriate when responding to CMRE questions. Frequently there is no single, irrefutable answer to a business problem, so the exercise of professional judgment becomes critical.

A.2.6 Responding to Users' Needs

In many instances, the preparation of a satisfactory professional response requires the evaluation of alternatives and the presentation of practical solutions and recommendations that meet, to the extent possible, the requirements and objectives of the parties to which the candidate is responsible within the context of the question. These user needs will vary with the scenario presented in each question. The candidate must determine the effect that such requirements and objectives have on the priority of, and the approach to be taken to the issues presented.

A.2.7 Effective Communication

A requirement in the work of Marketing Researchers, and therefore a fundamental skill tested in the CMRE, is the ability to communicate effectively. Limited in scope to written communications, the CMRE evaluates the ability of candidates to convey their ideas clearly, concisely, and logically. Effective communication in responding to the questions necessitates that candidates:

- present ideas in a logical sequence;
- clearly explain the application of principles and theories; and
- present arguments that are relevant and reasoned.

Communicating effectively means conveying relevant information in a manner suited to the role assigned by the question and designed to meet the users' needs. If, for example, the question requires the candidate to write a memo to a fellow Marketing Researcher, then it may be acceptable to omit explanations of technical concepts/terminology that the researcher is certain to know. If, however, the question requires the candidate to write a report to a non-researcher, then more explanation may be necessary and non-technical language should be used to the extent appropriate.

It should also be noted that communicating a complete response requires much more than providing the correct answer. In fact, a correct answer may only represent a small portion of the overall score for a question. The bulk of the grade will be awarded to the identification and analysis of the issues and a rationale that clearly supports the answer provided.

Although in practice formatting a document is important when presenting it to a client or end user, less attention will be given to this aspect of communication on the exam. Given the limited time and wide variety of questions covered on the single and multi-subject questions, the communications component of the grade for each question will focus entirely on the bullets mentioned above under this sub-heading. For the case study, the emphasis of the communications component of the grade will also focus on the bullets above but some points will be awarded for a properly formatted response.

A.3 Qualifying to Write the Exam

The core courses in the MRIA Institute for Professional Development program cover the key theory required to be successful on the CMRE. They are all taught from a practitioner perspective and focus on how the theory is applied to real marketing research problems. The goal of the MRIA Institute for Professional Development program is to ensure that candidates are ready to write the exam.

Although the MRIA Institute for Professional Development program is focused on application, there are limits to what a candidate can learn in the relatively short length of the individual courses. The qualification requirements established by the MRIA **require both academic knowledge and professional experience**.

The CMRE is intended to confirm that a candidate has the skills and experience that a CMRP should have. The purpose of the qualification criteria is to ensure that candidates have the skills and experience required to be successful on the CMRE.

Given the focus of the CMRE on a candidate's ability to apply marketing research theory in practice, it is essential that a candidate obtain the appropriate level of experience. To be successful on the CMRE, it is recommended that, at a minimum, a candidate's experience provide them with the opportunity to repeatedly apply most of the A and B level topics included in the *Core Curriculum Competency Requirements* document. Candidates should, therefore, seek opportunities to practice as many of these areas in their jobs as possible and should consider gaining experience in the majority of the key areas before writing the exam, even if they already have the minimum experience required to write the CMRE.

[2] For further details on equivalencies and qualifications to write the CMRE, please visit the MRIA Institute for Professional Development section of the MRIA web site at: http://mria-arim.ca/education/cmrp-certification/cmrp-overview

A.4 Maintenance of Certification Program

As of January 2011, all CMRPs are required to adhere to MRIA's Maintenance of Certification Program (MCP) to maintain their designation. The purpose of the MCP is to ensure that all holders of the CMRP are pursuing continuing professional development throughout their careers. Most, if not all, professions require continuing professional development of their members.

Several principles were followed in developing a framework and a process that would enable CMRP Maintenance of Certification to be implemented. These principles can be found on the MRIA website at http://mria-arim.ca/education/maintenance-of-certification/overview.

Professional development is measured by a point system. This point system is simple: CMRPs must accumulate 50 points within a two-year period, from January to December. The system is flexible and, above all, depends upon the CMRP holder to chart a course of action for their own professional development, whether they are a recent CMRP or an established industry leader. Points can be accumulated under any or all three of the following areas: learning, leadership skills, and knowledge sharing (see http://mria-arim.ca/education/maintenance-of-certification/points-chart for details).

B. Preparing for the Exam

As described in the previous section, the CMRE focuses on testing a candidate's ability to apply marketing research knowledge as opposed to simply testing the candidate's understanding of marketing research theory. That means that a candidate must not only understand the theory but also know how it is used in practice. The best preparation for someone planning to write the CMRE is to obtain as wide a range of experience as possible. If your experience has been in one area of research or you have more recently focused on one area of research, it is advisable to try to update your experience working in other areas of marketing research and intelligence before you sit the exam. If you have had the opportunity to work on a wide variety of research projects, you are likely already very well prepared to write the exam. Still a quick review of theory will help you remember why we, as researchers, do certain things the way we do and that will allow you to include a strong rationale in support of your answer.

This section:

- provides suggestions on how to study for the CMRE;
- outlines some of the key things you should know under each area in the *Core Curriculum Competency Requirements* document;
- includes references to relevant external readings.

B.1 How to Study

If you have a good understanding of marketing research theory and have had sufficient professional marketing research experience, you will likely already know most of the answers to the questions on the CMRE. The purpose of your studying should be to review the theory that supports what you know so that you can include this in your responses. If much of your experience has focused on one area of research, then you are advised to pay closer attention to the areas of which you have less experience.

A good approach to start is to look at the key areas listed in the *Core Curriculum Competency Requirements*, as well as the topics covered in the core courses and make a note of the topics where your understanding may not be at optimum level. Areas you mark off should be priorities for your studying.

In your studying, you should focus your efforts on understanding any theory with which you are not already familiar. Simply memorizing definitions or lists will likely be of little value when writing the CMRE. Exam questions will primarily ask you to apply concepts to situations that a researcher would likely see in practice.

B.2 Levels of Understanding

The range of services provided by Marketing Researchers has expanded considerably in recent years. It is not possible for entry-level Marketing Researchers to have mastered all potential areas of service within the prescribed term of practical experience and education.

In fact, even the most experienced Marketing Researchers are not likely to have mastered everything.

The CMRE, therefore, focuses on testing the skills and knowledge that are most fundamental to the practice of marketing research, as described in the *Core Curriculum Competency Requirements* document.

B.3 Reference Materials

Many books have been written on the topics of marketing and marketing research and most of them would provide solid background on marketing and marketing research for the CMRE. The textbook we are recommending is ***Modern Marketing Research Step-by-Step*, by Chuck Chakrapani and Ken Deal.**

This book, which was the original textbook of choice for the Institute and its predecessor, the School of Marketing Research, was completely revised by the authors in the summer of 2010. Two chapters on advanced analysis have been added at the end of October 2010. The textbook will undergo further updates in the coming years to keep in sync with evolving course requirements. The text can be accessed online completely free of charge at any time: http://www.chuckchakrapani.com/StepByStep/default.asp. Alternatively, a printable copy of the manual or of each chapter can be obtained for a small fee.

Another useful general resource is: *Marketing Research: An Applied Orientation*, by Naresh K. Malhotra. This book is available on the Pearson education website or through an online bookstore such as Chapters.indigo.ca or Amazon.ca.

A few areas of the curriculum not covered off in detail in *Modern Marketing Research Step-by-Step* are Professional Practice, Marketing Management, and Market and Competitive Intelligence. Suggested reference materials for these topics are provided by the core courses' instructors. Moreover, the courses' handouts constitute useful reference materials.

For Marketing Management, any university level marketing textbook such as the Canadian editions of *MKTG,* by Charles W. Lamb et al. (2010), or *Marketing: The Core*, by Roger Kerin et al. (2009), will have the theory you need on the key marketing concepts listed in the *Competency Requirements* document.

B.4 What to Study

B.4.1 Professional Practice

Professional practice is fundamental to the CMRP designation. It is important for all candidates to fully appreciate the fact that the CMRP is an MRIA designation. Whether candidates have received their formal training from the MRIA Institute or from an educational institution, they must be MRIA members in-good-standing to obtain and to maintain the CMRP designation. This implies being knowledgeable about:

- MRIA’s Code of Conduct and Good Practice;
- MRIA's Ten Core Principles;
- the Charter of Respondent Rights;
- individual and corporate membership requirements of the Association;
- Gold Seal certification requirements;
- the Research Registration System;
- the Qualitative Research Registry; and
- MRIA’s empirical and estimation methods for calculating response rate.

The CMRE may include questions on any or all of these topics. Consequently, all CMRE candidates – whether they are new or long time MRIA members – are advised to familiarize themselves with these topics, all of which are fully detailed on the MRIA website.

Some questions to guide your studies are included below. Note that these are intended only to guide your study to some of the most important topics about the MRIA Standards. These are not the kind of questions that you would likely see on the exam but some of the issues identified in them will be covered.

- What are the issues in combining selling or fundraising into a marketing research project?
- Is it ever appropriate for a marketing research firm to engage in telemarketing or fundraising? Why or why not?
- For what purposes would it be appropriate to merge survey data with data in client database? When would it be inappropriate?
- A research company is looking to gain business from another company in the same industry as one of its existing clients. What are its responsibilities to its existing and potential clients? Under what conditions would it be appropriate for a research company to have two clients in the same industry?
- Can a researcher share high level results from work done for a former client in order to attract a new client in the same sector?
- Under what conditions, if any, can video recordings of focus groups be given to a client?
- If a sufficient number of focus groups are conducted (say 15 groups of 10) on the same topic, is it appropriate to include percentages and/or margins of error in a report? Why or why not?
- What are the issues with reporting margins of sampling error for panel based sample surveys? When is it appropriate to report the margin of error and when is it not?

B.4.2 Marketing Research Design

Designing a research study involves defining the research objectives to solve a marketing problem and then selecting the best methodology to achieve those research objectives. To be able to identify the best methodology the research objectives must be articulated in a way that allows them to be solved using research. Often there are multiple research objectives to a marketing problem and one of the skills a Marketing Researcher must have is to be able to analyze the marketing problem and the related factual information around the problem and identify the best marketing research objectives to solve the marketing problem.

Once the marketing research objectives have been established, the Marketing Researcher must then be able to identify and select an appropriate methodology for solving those research objectives. There are often multiple ways to solve a set of research objectives and the researcher must be able to justify the reasons for a recommended approach.

Identifying the appropriate research objectives and methodology is critical to the success of a research project. Research design is, therefore, a component of many questions on the CMRE. A list of the key issues a researcher should be familiar with is provided below.

- What are the benefits of conducting a marketing research study to solve a marketing problem?
- What are the differences between marketing problems and marketing research objectives?
- Consider some common marketing problems and determine what the research objectives should be?
- How can marketing research be used to monitor trends and track performance? Why should it be?
- Are there times when it makes sense to go ahead with a business or marketing decision without conducting marketing research? What criteria should be considered in making this decision?
- When is it appropriate to use a causal, exploratory or descriptive research?
- What are some of the key differences between qualitative and quantitative research? What are examples of each? When are each most appropriate? What are the limits of each?
- What are some of the differences between mail, internet, in person and telephone surveys? When are the advantages and disadvantages of each?
- What are omnibus studies and when should they be used?
- What are panels and what are the advantages and risks in using them?
- When should secondary research be used over primary research?
- What are some typical sources of secondary research?
- What are some of the key considerations in evaluating the value of a secondary research study/source?
- What is a syndicated study and when should they be used? What are possible disadvantages of syndicated studies?
- What are the key components of a good marketing research proposal?

B.4.3 Statistical Methods for Marketing Research

Quantitative research relies heavily on statistics. Basic statistics are fundamental to determining the reliability of data and assessing whether differences in results are likely true differences or just a result of chance. Specialized quantitative applications also use much more complex statistics. A CMRP is not expected to be a statistician but should have enough knowledge to calculate and understand the application of basic marketing research statistics. A CMRP should also understand more advanced statistical procedures well enough to be able to know when the technique should be used, provide a simple explanation of the technique, interpret and make recommendations on the results of the technique. For the calculation of response rates, you should also be familiar with the MRIA endorsed methods found in the Standards section of the MRIA website.

While the CMRE used to contain a few questions requiring candidates to have memorized basic statistical formulas, this is no longer the case starting in 2011. The goal of the CMRE is to test candidates on what professional marketing researchers actually do. It is much more important that you understand the correct statistical procedures to apply given the type of data collected than be able to memorize a number of formulas. Although most statistics are normally calculated using statistical software, a candidate should understand basic statistics well enough to be able to compute them by hand. Consequently, there will still be questions requiring computations of basic statistics in the exam, but candidates will be provided with a sheet containing the following basic statistical formulas.

- Mean:
  - Sum of the values of the observations / Number of observations (sample size).
- Median:
  - Value or observation in the middle when the data are arranged in order of magnitude (either ascending or descending).
- Mode:
  - The most frequently occurring value in a distribution.
- Standard Error of means:
  - Standard deviation / Square root (SQRT) of the sample size.
- Standard Error of percentages[3]:
  - SQRT ((%*(100-%))/ sample size).
- Confidence Intervals:
  - Mean □ confidence coefficient * standard error
- Standard error of difference:
  - SQRT((Standard error of group 1)^2 + (Standard error of group 2) ^{2})
- t-test for means:
  - (mean of group 1 – mean of group 2) / standard error of difference
- t-test for percentages[4][5]:
  - (% in group 1 - % in group 2) / standard error of difference;
- Sample size:
  - 2500 / (required margin of error / confidence coefficient for required confidence level)^2

[3] For Standard Error of proportions, use: SQRT((P*(1-P))/sample size).
[4] For proportions, use: (P1-P2)/standard error of difference.
[5] Also referred to as z-test for percentages or proportions by some authors.

- Finite Population Correction (FCP):
  FPC Sample Size = sample size / (1 + (sample size / size of population))
- A few of the calculations used above require confidence coefficients, 95% is the most commonly used confidence level, but you should also know the confidence coefficients for 90% and 99% confidence levels. The confidence coefficients are:
  - 90%=1.65
  - 95%=1.96
  - 99%=2.56

In the examination room, you will be provided with a basic calculator and have access to Excel. In preparation for the exam, make sure you can calculate the above statistics using either the basic calculator or Excel. Practicing some of the samples provided in Section D will help you better understand the application of these statistical procedures. In addition to understanding the above statistics you should also know the answers to the following questions:

- What are the advantages of a sample over a census? Why might a sample be more reliable than a census?
- What is the difference between a population and a sample frame?
- What characteristics are desirable in a sample frame?
- What are the different ways that a sample can be drawn and what is the implication of each method?
- What is the difference between a probability and a non-probability sample? What are the advantages and disadvantages of a non-probability sample?
- In what case might disproportionate sampling be recommended? What adjustments are required when analyzing the data as whole? What impact does disproportionate sampling have on the reliability of the sample?
- Why might cluster sampling be desirable? What are the disadvantages?
- What is the difference between sampling error and non-sampling error? How can each be controlled? What are some examples of non-sampling error?
- What factors should be considered when selecting a sample size?
- How do you calculate a response rate? (See calculation in the Standards section of the MRIA web site)
- What is a confidence interval and what is a confidence level. What do they explain?
- How do you calculate a sample size once you have decided on the desired precision and reliability of the sample?
- Does the size of the population have an impact on the sample size? In what cases?
- What is nominal, ordinal, interval and ratio data? Provide examples of questions that would gather each type of data. What are the implications when analyzing the different data types?
- Define, calculate and explain the significance to marketing research of mean, median, variance, and standard deviation.
- When might a median be a better measure of central tendency then a mean?
- Calculate and explain what is meant by standard error of the mean and standard error of a percentage or proportion.

- When would it be appropriate to use the following types of analysis? What kind of data is required to use them? What conclusions could be drawn on the results provided by these techniques?
    - Chi Square
    - Correlation
    - Multi-Dimensional Scaling
    - Regression
    - Analysis of Variance
    - Discriminant Analysis
    - Factor Analysis
    - Cluster Analysis
    - Conjoint and Discrete Choice Analysis
    - Structural Equation Modeling

B.4.4 Questionnaire Design

Once the research objectives have been established and a quantitative research design has been selected, the next step is to design a questionnaire that will collect the data required to achieve the research objectives. Errors in the questionnaire design stage could undermine the entire research project. Poorly worded questions could lead to data that is ambiguous and impossible to interpret. A questionnaire that is too long or that contains inappropriate questions could also result in a low response rate thereby, reducing the reliability of the data and increasing the costs of data collection. Questionnaire design is, therefore, an essential skill for a researcher and candidates should expect questions that deal with questionnaire design on the exam. Some key questions to guide your study of questionnaire design are provided below.

- In what sequence should questions be asked and why?
- What is the purpose of the main sections (screener, warm-up, main section and classification) in a questionnaire?
- When is it better to start with broader questions and then move to more specific questions and when is it better to start with specific questions and then move to broader questions?
- What differences should be considered in self-administered vs. interview-administered questionnaires?
- What special considerations (e.g., layout, type of questions, questionnaire length, scales, unique features) are there for questionnaires administered in person, over the phone, through regular mail, and over the internet?
- What needs to be taken into account when developing the wording of a questionnaire?
- What are double-barrelled, leading, and loaded questions? Why should they be avoided?
- What are common respondent biases and how should they be countered in the design of a questionnaire?
- How and when should private and personal questions be asked?

- What types of questions are best for measuring attitudes, assessing behaviour and collecting demographic information?
- What are the advantages and disadvantages of open ended questions?
- What is a dichotomous scale and when should it be used?
- What are the advantages and disadvantages of ranking scales? When should they be used and when should they be avoided?
- What are numeric, Likert, bi-polar (stapel), and semantic differential scales? What are the advantages and disadvantages of each?
- What is the purpose of pre-testing?

B.4.5 Qualitative Marketing Research

Solving marketing problems frequently requires an in-depth or broad exploration of a subject. Unlike quantitative research, qualitative research doesn't generally rely on statistics but it does rely on a unique set of tools that all researchers should understand. Questions on qualitative research will also require strong skills in applying the theory and it is, therefore, recommended that CMRE candidates have sufficient experience with qualitative research before taking the CMRE. Focus groups (and variations of them) and in-depth interviews continue to represent the bulk of qualitative research conducted in Canada. Questions on qualitative research on the CMRE are most likely to focus on these two qualitative research techniques.

Although moderating/interviewing experience is not required for the exam, you should at least have had experience observing focus groups. You are required to know enough about moderating to be able to assess the quality of a moderator you observe. You should also know the best ways to handle difficult respondents and difficult situations that occur on a regular basis. For the exam you should also be able to write a discussion guide and qualitative screener. As with the other topics, a list of questions is provided below to guide your study.

- How should qualitative research participants be recruited? What considerations should be made when selecting respondents for qualitative research? What is the purpose of a qualitative research screener?
- What factors should be considered when selecting the geographic locations to conduct qualitative research?
- What criteria should be used to select between in-depths interviews and focus groups (or variations of them)? When should larger (mega) groups be used and when would smaller (mini) groups be best?
- What is observational and ethnographic research? What are the advantages and disadvantages of these over other forms of qualitative research?
- What are bulletin board and online focus groups? When should each be used? What are the advantages and disadvantages of online and bulletin board focus groups over in person groups?
- What is the role of the moderator? What skills should a moderator have? What techniques should a moderator use to maximize the value of a group or interview?

- How do you determine the number of groups or interviews for a qualitative study?
- If a focus group is recruited at random, does it impact the projectability of the results?
- What is the Qualitative Research Registry and what is its purpose?
- How does a discussion guide differ from a questionnaire? What are the key components of a discussion guide and what sequence should they follow?
- What is the role of observers in a focus group?
- What are projective techniques and what is their purpose in qualitative research?

B.4.6 Market Intelligence/Competitive Intelligence

Market intelligence (MI) comes from the strategic use of a carefully analyzed collection of key information, both internal and external to the corporation. MI is imperative to better decision making, success, and even survival for firms today. Interest and investment in market intelligence is increasing, as firms see its power and benefit. Solid market intelligence can dramatically impact a company's success. Becoming competent in the market intelligence area means that market researchers elevate their position, and use a broad range of business consultative skills.

The related, but yet distinct, discipline of Competitive Intelligence (CI) is as important for professional marketing researchers to master. Clients might need competitive intelligence services to counter a competitive threat, to benchmark against industry leaders and learn about their best practices, to uncover competitor weaknesses which in turn can be translated into advertising messaging and sales presentation aids, or to conduct mystery shopping to identify gaps in their own sales and service delivery.

The white paper *Using Market Intelligence & Competitive Intelligence to Add Value to Your Business*, by Matthew Harrison and Julia Cupman of B2B International (https://www.b2binternational.com/publications/competitor-intelligence/)provides a good overview of these disciplines. MRIA's core courses *301-Competitive Intelligence, Competitor Benchmarking and Mystery Shopping* and *302-Market Intelligence* are essential to CMRE candidates who have not yet acquired sufficient knowledge of these disciplines through work experience. As with the other topics, a list of questions is provided below to guide your study.

- Could you define market intelligence (MI) and competitive intelligence (CI) and their roles in business?
- What is the relationship between these disciplines and marketing research?
- Describe the main components of the MI process.
- Describe the main sources of MI information.
- What does it mean to conduct an environmental scan? What are some of the things you could do if a client asked you for an environmental scan?
- Can you briefly describe some MI tools and techniques and when you would use them?
- What is the difference between active and defensive competitive intelligence (CI)?
- Your client is asking you to provide guidelines for an employee tutorial on ethical CI approaches. What would your guidelines include?

- In terms of sources of CI data, what are 3 popular:
  - Primary sources external to companies?
  - Primary sources of CI data within companies?
  - Online sources?
  - Secondary sources?
- Give an example of how monitoring blogs can be used as a data source.
- When would it be appropriate to use the following data analytical tools? What conclusions could be drawn on the results provided by these techniques?
  - Blind spot analysis
  - Data cell screening
  - Ratio analysis
  - Win-loss analysis
- What are the differences between accidental, unintentional, intentional, and malicious company information leakage?
- How would you instruct a client company to reduce leakages of sensitive information by their employees to their competitors
- How would you conduct a competitor benchmarking study? What is the minimum number of companies you would benchmark. How many people within each of these companies would you interview? Besides offering an honorarium, what other incentive could you offer them to get them to participate?
- What is the usefulness of mystery shopping? When would you recommend it to a client? What are some key differences between retail and B2B mystery shopping? Besides face to face and call centre mystery shops, how else can you conduct mystery shops?

B.4.7 Marketing Management

Marketing research is conducted to gather information that will help improve marketing decisions. It is, therefore, essential that a researcher have a good understanding of marketing. A researcher is not, of course, expected to be an expert in all areas of marketing but should have an in-depth understanding of the key marketing concepts covered in the core courses. Remember, you are unlikely to find a question on the CMRE that asks you to define any of the key concepts in marketing. You should, however, expect questions that ask you to identify key marketing problems and describe how marketing research is used to solve those problems. You may also be asked to examine research results and provide a recommendation to respond to a marketing problem.

If you do not already have a good understanding of the key marketing concepts listed in the *Competency Requirements* document under Marketing Management, then reviewing a textbook on marketing would be a good start to your studying in this area. The MRIA doesn't recommend a specific marketing textbook but any university level text book should do.(See Section B3 of this Study Guide for suggestions.)

As you review the topics covered in the core courses, try to consider the marketing problems that relate to these concepts and how marketing research can help to solve them. Some of the key questions you should be able to answer on marketing management are presented below. Again the purpose of these questions is to refer you to the key concepts that you should understand, but the CMRE will not include definitional questions like these.

- How does decision making by end consumers and business organizations differ?
- What is market segmentation and why and when should it be used? What are common ways to segment a market? When is each used? What is the role of marketing research in segmenting a market?
- What is a target market? How does target marketing relate to market segmentation?
- What is product positioning? How is it different from market segmentation? What are the different ways that a company could position a product?
- What are the key components of a marketing strategy? What are the generic marketing strategies?
- What is the marketing mix and why is it important? What are the key decisions to be made in the marketing mix? What factors influence those decisions?
- What is branding? How is a brand different from a product?
- What are the different ways of communicating to customers about a product?
- What factors need to be considered when pricing a product?
- What are the different ways that a product can be distributed to consumers?
- What are the common marketing problems that research is used to solve?
- What types of research are used to solve common problems?

C. Writing the Exam

For many exam writers, it has been many years since they have taken an exam. This section will:

- inform you of what you should expect on exam day; and
- provide general exam writing strategies.

C.1 What to Expect on Exam Day

On exam day you are advised to show up early to ensure you have a chance to familiarize yourself with the testing centre prior to the start of the exam. Before the exam begins, you will have time to review the instructions provided with the exam.

C.1.1 Sample of Exam Instructions

Time: 3.5 Hours ***(8:30 am – 12:00 pm)***

Instructions:

1. This is a closed book exam. Calculator, response booklet, pencil and eraser are provided.
2. You are required to bring your own laptop for the exam.
3. You must have downloaded and tested the SecureEaxam software prior to your arrival on the exam day.
4. All your answers must be entered into SecureExam.
5. While the answers in your response booklet are not marked, the marker can use the booklet to understand your methodology.
6. **Do not include your name anywhere.** Your response will be marked using your candidate number.
7. You are required to return all materials to the proctor.

This portion of the exam is worth 50% of the overall mark. You must receive at least 65% on each portion - the research proposal and the short answer portions - in order to receive a pass.

C.2 Exam Writing Strategies

Earlier sections of this guide prepared you for the type of content you would experience on the exam. Given your marketing research experience and education, you probably found few surprises in the type of content that is covered on the CMRE. It has, however, likely been several years since you have last written an exam and if that is the case, this section may make the difference in how you fare on the exam.

C.2.1 Be familiar with the exam instructions and format

Although you will have time on exam day to read the instructions before the exam begins, you'll avoid any surprises by getting familiar with them ahead of time. Reading this guide will hopefully increase your comfort on exam day. It is also recommended that you review the MRIA website a month before the exam in case any changes have been made to the exam since this guide was published.

C.2.2 Read all questions carefully

Before you respond to a question be sure you have read it carefully. Rushing through a question could result in you wasting time writing more than is required or even worse, answering the wrong question completely. Reading all questions carefully is a very good investment of your time.

C.2.3 Focus on the important facts

When dealing with real marketing research problems in practice, there is often a lot of background information that is useful to know in dealing with the project as a whole but is not relevant to a specific marketing research question or problem. The exam questions provide background information that may not be specifically relevant to answering the question. After you have read through the question, try to identify what is important and ignore what is not when answering the question.

C.2.4 Manage your time

Time management is an essential skill in writing an exam and many of the other tips listed here are directly related to how you spent your time on the exam. A good overall time management strategy is to determine how long you have to answer each question. To do so, divide the total minutes in the exam (3.5 hours multiplied by 60 minutes = 210 minutes) by the total marks for the exam. Assuming there are 150 marks in the exam, than you have 1.4 minutes per mark per question. If the question is only worth 5 marks, then you don't want to spend more than 7 minutes on it and that includes time spent reading the question. You will ideally want to spend less than 7 minutes because you'll want to save some extra time at the end to review your responses.

The total marks for the single and multi-subject exam will be printed on the exam cover sheet, so you will have a few minutes to read it before you start, so use this time to calculate this number before you begin the exam. The marks for each question on the single and multi-subject exam will be included next to each question so make sure you are spending the correct time on each question.

The case study question is marked out of a 100 which means you have 2.1 minutes (210/100) per mark. Having a solid understanding of the issues is especially important part of responding to a case study, so be sure to spend time analyzing the case study before you start your response. When you do begin answering, try to think about what the case study is asking and what will generate marks.

C.2.5 Don't over answer

One of the most common time management pitfalls exam writers have made when writing the CMRE is providing an answer that goes well beyond what is required. While adding a little extra when writing reports for clients is a good thing, writing more than is required when time is limited is not. There is only a limited time to complete the exam. Several past exam writers have found that the extra time that they spent on questions early in the exam resulted in not enough time to complete (or at least properly complete) some of the other questions later in the exam. The best way to take advantage of a question you find easy is to spend as little time as you can to achieve full marks. If it is a 5 mark question and you have calculated that you have 7 minutes to spend on it, try to answer it in 4 minutes so that you'll have additional time to respond to questions you find more challenging or time consuming later on in the exam. Remember, if it is a 5 mark question, there is no reason to continue writing once you have a response that will earn you the full marks for the question. No bonus marks are assigned for answering beyond the 5 marks.

C.2.6 Proofread your answers

If you have completed the exam and have some extra time on the clock to spare, then rather than submitting your response early, use this time to re-read your responses. You might find a missing word or grammatical error that changes what you were trying to say and could cost you marks. Also be sure that you have communicated responses as clearly as possible.

C.2.7 Leaving formatting to the end

Don't be caught wasting time formatting your exam. Although it is important that your communication is clear, especially in the case study, no marks are offered for formatting on the single and multi-subject exam and formatting is only a minor aspect of the case study section. If you have time to format at the end, then do so after you have proofread your responses.

C.2.8 Start with what you know

The best way to boost your confidence on an exam is to answer questions that you know best first. If these aren't the first questions on the exam, then remember there is no requirement to answer the questions in order. If the answer to a question isn't coming to you right away or if you feel it will take you a long time to answer a question, skip it and answer the questions you know first. Since you will be leaving more difficult questions to the end, you should be sure to spend as little time on the questions you know to earn the number of marks the question is worth. Whether or not you write your responses in order, be sure to number them so the exam markers know what response goes with each question.

C.2.9 Remember that there are multiple answers to many questions

There are often multiple ways to address a real world research problem. Sometimes one is better than the rest but often there are multiple equally appropriate solutions. The same applies to questions on the CMRE. Don't be thrown off where it appears there may be more than one answer to a question. If the question asks for multiple options, then outline what these would be, and when and why each would be most appropriate. If the question asks for the best or top response, present the option that you feel would be best and be sure to justify your response. The majority of marks for the question will be allocated to your reasoning as opposed to the option you recommend.

C.2.10 Use your response booklet

Since the exam has moved to a computerized format, few writers have taken advantage of the workbook provided. For questions that involve calculations, the workbook is a great tool for making notes and working out a problem. Best of all, if you have shown the steps you have taken in the workbook but made a small mistake in one of your calculations, you can at least get partial marks if you show the correct steps in your workbook.

D. Are You Ready?

You have obtained the required professional experience and you've brushed up on any theory you were missing. It is now time to see if you are ready to write the CMRE. This section provides examples of questions written in the same style as the questions that will appear on the exam. As on the CMRE, the questions are not presented in any particular order and it is up to you to identify the research theory that applies.

Full responses are not provided but key points that should be included in your answers are included for most questions. It is recommended that you try to answer all the questions before reviewing these points. Where answers are not provided, please refer back to the reference materials cited earlier, especially *Modern Marketing Research – Step by Step*, course handouts, and the Standards section of the MRIA website.

This section:

- provides examples of CMRE style questions;
- includes both a comprehensive case study and single and multi-subject questions;
- outlines some of the key points that you would be expected to include in your response.

*****It is important to note that the following sample questions have been selected to help you prepare for the CMRE. However, this section is not intended to be representative of an actual CMRE composition. For instance, there are more questions requiring statistical computations in this section than there will be in the actual exam since performing statistical computations improves with practice.**

D.1 Sample Comprehensive Question (Part A)

ZAP computers, a very successful computer hardware manufacturer in Canada, is considering developing a new line of laptops that include a cell phone built into the computer. The cell phone could be removed and would include a separate hard-disc to allow the user to easily transport files that are on the laptop. Your VP of Marketing at ZAP is very excited about this concept. He is pretty sure that there is nothing else out there on the market like this and he believes that it will give ZAP a competitive edge in the very competitive hardware market. There is a significant cost to developing this product but, if successful, the product could more than repay those costs in the first six months.

ZAP computers' current line of laptops is called Zaptops and each model has a new number. Z-45 is the current model (Z-44 was the last previous model). One of the questions being considered is whether the new model will follow the same naming convention and be the Z-46 or whether a new name such as Zaptop Plus, Zaptop Premium or something else should be used. The company is also considering whether the cell phone should be a standard feature or an optional feature in its new models.

Much of ZAP's success has come from attracting business customers who want a reliable computer without many bells and whistles at a lower price than the competition. It has about 34,000 business customers who purchase on average 15 laptops per year. The company has not previously been seen as an innovator and it hopes to attract a new customer base with the new technology. It does not expect that it would lose any existing customers. For existing customers although the new model will be more expensive than the previous, it will be less expensive than purchasing both a ZAP laptop and a cell phone.

Before making the investment, the VP of Marketing at ZAP has asked you, the Director of Marketing Research at ZAP, to propose some research that would reduce the risk in making this investment.

Key Points:

- Write a formal proposal that would be suitable for presentation to a VP of Marketing who does not have a strong research background.
- Your proposal should include not only all of the **necessary stages** in a research proposal, but also provide a good understanding of **why** you are proposing various options, techniques or methods.
- Make sure to include the following in your proposal:
  - your understanding of the key marketing question(s) to be answered by the research and the resulting research objectives (in your own words);
  - assumptions made and questions for which you would want to have answers;
  - the research method(s) you would recommend using, focusing on why this approach is better than other possible methods;
  - who the research would be conducted with, how they would be reached, how many of them would be contacted, and why this number has been selected;

  - an outline of the data collection instrument(s) you would recommend using (questionnaire, screeners, discussion outlines, etc.);
  - a high level description of how the data would be analyzed and how the results will address the key marketing question(s);
  - a timetable for the project; and
  - a rationale for the approaches you have recommended.
- You will not be asked to provide detailed costing. However, you may be given a budget range and, if so, will be asked to provide the total expected cost and the percentage of the budget that would be applied to each major aspect of the research. Keep in mind budget and timeline do not need to be precise, but do need to be realistic.
- You are not expected to provide supplier specific information which would normally be part of a proposal, such as researchers' biographical notes and examples of similar projects.

D.2 Sample Single and Multi-Subject Questions (Part B)

Sample 1

You have just completed a survey of adult (18 years of age or older) Canadians, who have a bank account, on their banking preferences. In total, 2000 valid interviews were completed. In the process of completing the 2000 interviews, the call centre reported that they made 843 calls to numbers that were not in service or were business numbers, 2434 were busy or unanswered, 334 were not completed due to language problems and 459 for household refusals before respondents could be qualified, 683 respondents refused also before screening, 450 qualified respondents were not available, 185 respondents hung-up mid way, 434 did not qualify because there was no one 18 years of age or older or no one that had a bank account, and 770 people refused after screening and qualifying. What is the response rate for this study using the empirical and estimation methods? Which calculation should be reported?

Formulas required to answer this question can be found at the following link to the MRIA web-site http://mria-arim.ca/about-mria/standards/response-rate-calculation-formula.

Key points:
- Response rate using empirical method is: 31.4%
- Response rate using estimation method is: 29.1%
- Empirical method calculation should be reported as it is the MRIA standard. Estimation is a secondary method that can be reported in addition to the empirical method.

Sample 2

A computer hardware manufacturer is looking to launch a new personal digital assistant (PDA). It would like to conduct marketing research to get reaction to two potential product designs. Design 1 emphasizes style and is sleek and small but as a result of its design the buttons are crammed together a little more than the Design 2. Design 2 has less style and is a little bigger but the extra space means the buttons are less crammed and it is easier to use. The Design 1is more like the competition and the VP of marketing is certain that Design 2 even though it has less style will appeal more to the target audience: sales professionals and business executives. Design 2 can also be produced less expensively. The VP of Marketing has asked you to conduct focus groups to gauge reactions of the intended market. He has started to develop the discussion guide for the groups below and he has asked for your feedback on it. How do you respond? What changes would you suggest and why?

- Introduction – confirm all respondents are sales professionals or business executives who use and purchase their own PDA.

- What advantages does Design 2 have over Design 1? Probe for ease of use.

- Is ease of use or style more important in a PDA used for business purposes?

- Is price or style more important for a personal digital assistant/cell phone used for business purposes?

- How does Design 2 compare to the competition?

- Between Design 2 and the competition, which one would you choose? Why?

- Between Design 1 and the competition, which one would you choose? Why?

Key Points:

- Per section C: Subsection 3 of the MRIA Code of Conduct the intro must inform all participants about confidentiality, recording etc.
- The discussion guide is strongly biased to lead respondents to selecting Design 2
- Before getting into designs, it would be useful to better understand what respondents considered in choosing their current PDA
- Participants should be asked what they like and don't like about each model
- Projective techniques would be a more subtle way to gauge the importance of style. If asked directly, most are likely to provide the rational response that price and usability are more important in a business tool

Sample 3

You are the Brand Manager for Spex brand chewing gum and you are observing focus groups to gauge reactions to some new ad concepts you are considering. Your usual moderator indicated that he was sick and you agreed to have a backup take his place. The moderator does a great job with the first group but after 20 minutes in the second group, he is struggling to manage the group dynamics. Two participants are doing most of the talking. One is very outspoken and likes to get her views across. The other just indicated that the reason he knows so much is because he is the art director at a major advertising firm. The other six participants in the group have said virtually nothing. Industry experts should have been screened out of the group. The moderator has just come to the back room to see if you had any questions. How do you respond?

Key Points:
- Ask that the art director be subtly removed from the group (e.g. reception could interrupt saying there is a phone call for him)
- Ask the moderator to remind participants that the purpose of the research is to gather all opinions and to encourage anyone who has different views to put them forth
- You could suggest that the moderator use eye-contact and direct questions to try to engage the other participants. If necessary, could also ask the outspoken person to not talk ("great thought but I'd now like to hear what others have to say")

Sample 4

The VP of Marketing at a large jams and preserves manufacturer has noticed that despite an increase in dollars spent on advertising, sales have steadily been decreasing over the past year. What are some potential causes of the sales decline and how could you confirm that they are the cause?

Key Points:
- Competitive Intelligence Analysis – changes in competitive landscape (new products/sizes/pricing)
- Change in consumer tastes – consider syndicated research on consumer food trends
- Advertising program is ineffective – ad testing/ad recall
- Competition is taking market share – market share survey

Sample 5

Your client Zendit, is a mid-sized Canadian courier company. The Director of Marketing has indicated that one of his goals is to increase customer satisfaction over the next year based on the results of research. A benchmark survey will be done now (the beginning of the year) and another survey will be done at the end of year. Extra effort has been made to satisfy Zendit's best customers (those who spend over $5000 per annum). The best customers represent about 20% of Zendit's customer base. He would also like to know what percent of Zendit's clients are using another courier company as their primary supplier. This is the first quantitative survey for Zendit though it has carried out qualitative research previously that identified the areas that customers consider in selecting a courier company. The qualitative research revealed that courtesy and professionalism of drivers, price, reliability (on-time deliveries), and customer service were key in the decision making process.

Part 1 – The Director of Marketing has started to draft a questionnaire to describe the type of information he is seeking. He has asked you to review the questionnaire and indicate those questions that require change. Assume that the survey will be conducted by phone with 600 respondents. At least 300 customers of the total of 600 respondents should spend over $5000 per annum with Zendit.

Draft Questionnaire

Q1. For the past year, what was your total per annum expenditures on Zendit's services? $____
ENSURE THAT AT LEAST 300 INTERVIEWS ARE WITH THOSE WHO SPEND $5000K PLUS

Q2. How many courier shipments do you send per annum? How many were with Zendit?

Q3. How frequently have your courier deliveries to your end-customers been on-time?

Q4. How would you rate the courtesy and professionalism of the delivery staff?
Poor, Could be better, Fair, somewhat good, good, very good

Q5. On a scale of 1 to 10 where 10 is very likely and 1 is not at all likely, how likely are you to continue to use Zendit over the next year?

Q6. On a scale of 1 to 10 where 10 is very satisfied and 1 is not at all satisfied, how satisfied would you say that you are overall with the services provided by Zendit over the past year.

Q7. On a scale of 1 to 10 where 10 is to a great extent and 1 is not at all, to what extent have you observed the significant efforts Zendit has put into enhancing customer service over the past year?

Part 2 – After receiving your quote on doing the survey by phone, the Director of Marketing asks if it would be cheaper and equally valid to conduct the survey by e-mail. He reports that he has e-mail address for about 25% of Zendit's 4,537 clients. How do you respond?

Key Points for Part 1

- Q1- Annual spending is a sensitive question and the answer is not likely top of mind. As a screener, all that needs to be asked is if spending was above $5000 or $5000 and below Better yet, if this information is in Zendit's database, it might not be necessary to includes this as a screener at all. If required, a more detailed breakout of spending could be added to the end of the questionnaire.
- Q2- Difficult to answer and also sensitive – move to end and provide categories for number of courier shipments per year. Or ask in an average week how many shipments do you make by courier. To determine the percent delivered by Zendit, better to ask what percent were through Zendit and then the names of other major courier companies plus other.

- Q3 - Difficult to answer and code as an open-ended question. This question could be answered in different ways: a) either provide a scale or b) ask respondents what proportion of courier shipments were made on time
- Q4 - Poor scale since it is weighted to positive answers. Also the difference between fair and somewhat good may not be obvious to the respondent. The question is double-barrelled because it asks about courtesy and professionalism in one question. Each should be asked separately.
- Q6-Ask this first to get an overall view before asking specific questions unless there is a reason for this order (reverse funnel). Also, ask of the competition gathered at revised Q2 (other companies used).
- Q7 - Leading question. It would be better to ask what difference they observed in customer service over the prior year using a scale such as worse, the same, better.
- Effort should be made where possible to use the same scale for as many questions as possible where appropriate. Using the same scale would it easier and faster for respondents to complete.
- At a minimum need diagnostic information on all drivers from the qual – how is Zendit doing versus the competition.

Key Points for Part 2

- An e-mail survey would be less expensive than a phone survey but it assumes that the 25% is representative of the entire population of Zendit's clients. It may be that Zendit has the e-mail addresses of just the best customers or those that use Zendit almost exclusively which would limit the ability of getting reliable competitive information. If that is the case, then it might be reasonable. The e-mail survey would not, however, likely be sufficient to achieve the desired 600 completed responses. It may also result in a lower response rate. Suggest that sales reps,/others collect e-mail addresses from those without e-mail addresses (whenever these people contact Zendit ask for the e-mail address).

Sample 6

You are conducting research on behalf of ZAP, Inc., a large, pharmaceutical company that has recently introduced an anti-arrhythmic drug in Canada that offers the same benefits of a drug offered by its competition but with fewer side effects. Canadian cardiologists specializing in arrhythmias have, however, been slow to adopt your clients' new drug over the competition. The VP of Marketing at ZAP has asked you to conduct research to understand why. You have designed a quantitative survey to gather the required data and your client has provided you with a list of 687 Canadian cardiologists specializing in arrhythmias. This list is believed to captures at least 90% of the total population. The VP of Marketing, whose background in research is limited, has indicated that the reliability of this research is extremely important to ZAP. She has indicated that a sample size of at least 600 is required to provide the desired reliability. How do you respond to the VP of Marketing? Assuming a confidence interval of +/- 4% at the 95% confidence interval is desired, what sample size would you recommend? What other factors would influence the sample size? Why might the actual results not be as accurate as the confidence level and confidence interval suggest?

Key Points

- A sample size of 600 would be required to achieve a confidence interval of +/- 4% at the 95% confidence level for a sample that was less than 10% of the total population.
- Because of the small population, a much smaller sample size is required to achieve this confidence interval and level.
- A finite population correction should be applied and the actual sample size should be 320.
- Calculation: 600/(1+(600/687)).
- Although the study is important, the costs of reaching even 320 professionals at this level may exceed the resources (budget) available.
- The confidence interval and level do not account for non-sampling error and given the audience, response rate will likely be a factor in the reliability of the results. Incentives will also likely be required to obtain responses and this may also bias results if participants feel they need to respond more positively because of the incentive.
- As a researcher, you should ask your client to provide information on how the list was drafted and if the 90% of the total population in the list is expected to be identical to the 10% of the population that is not covered.

Sample 7

ZEDX Corp conducted a research survey of 600 customers to determine which of four new corporate logos its customers preferred. The main question on the survey asked customers to select 1 for logo 1, 2 for logo 2, 3 for logo 3 and 4 for logo 4.

Part 1 - The Marketing Manager for ZEDX who conducted the survey found that the mean score for the question was 3, and therefore concluded that Logo 3 was the best choice. He doesn't have a background in research or statistics and has asked you to confirm that he has interpreted the results correctly. How do you respond? Based on this information is 3 the correct choice?

Part 2 - Assume the frequency distribution for the results are as follows
Logo 1 – 5%
Logo 2 – 20%
Logo 3 – 45%
Logo 4 – 30%
What is the confidence interval for logo 1 and logo 3 at the 95% confidence level? Based purely on sampling error would you say that logo 3 is likely the best choice?

Key Points for Part 1

- Mean is not an appropriate measure because the data is nominal/categorical.
- To determine the preferred choice, a frequency analysis should have been used.
- It is not possible based on the information provided in Part 1 to determine if 3 is the correct choice.

Key Points for Part 2

- The confidence interval at the 95% confidence level for logo 1 (5%) is +/- 1.7% SQRT((5*(100-5))/600)*1.96 and for logo 3 (45%) is 3.98% (SQRT((45*(100-45))/600)*1.96) (Chakrapani page 312)
- The confidence interval for the next highest choice (logo 4) is +/-3.67 (SQRT((30*(100-30))/600)*1.96). Given that the there is no overlap you can conclude that 45% is statistically higher than 30 and that logo 3 is preferred by a larger percent than the other logos

Sample 8

Your company has conducted research to help it make a decision on whether an enhancement should be made to one of its core products. Other research has shown that the enhancement would greatly increase the appeal of the product to customers of its major competitor. The sales team, however, expressed concerns that the enhancements would increase the price of the product and some existing customers might switch to an alternative rather than pay the additional price. The Head of Sales estimated that if anything less than 90% of existing customers did not remain customers, then the company would likely lose money by going forward with the enhancement. As the research manager for the company you were asked to conduct a survey to determine if the enhancement should be made. Your survey of a random sample of 600 existing customers found that 92% of existing customers indicated they would definitely pay the premium for the enhancement. The head of sales indicated that since the margin of error for a sample of 600 at the 95% confidence level is +/- 4%, it is likely that the results could in fact be as low as 88%. What is your response?

Key Points

- The confidence interval of +/- 4% at the 95% confidence level applies only to percentages that are close to 50%. The confidence interval gets smaller as the percentage move further away from 50%. In this case the confidence interval is actually 2.17% at the 95% confidence interval SQRT((92*(100-92))/600)*1.96 so based on sample error it is actually fairly unlikely that the true percentage would be below 90%. Of course, there is still a 5% chance that with sampling error the actual percent will fall outside of the confidence interval. The non-sampling error might also influence the results. The marketing research data, however, supports going ahead with the enhancement based on the 90% figure but it is a close call and all the other business factors need to be considered (e.g., longer term impact of the changes). Looking into the other responses to the survey of those of the 8% who indicated they would not remain a customer (e.g., socio-demographic, preferences, needs or attitudes towards the competition) might provide insights into how the client may reduce their risk moving forward (e.g, ideas for implementation strategy, communications or value proposition).

Sample 9

You are the Director of Research for a successful niche travel insurance company called Nofear. Nofear provides travel insurance to adventure travelers and is considering

offering a credit card. Qualitative research has suggested that its customers are so attached to the Nofear brand that they'd switch cards in a minute if Nofear offered a card that had the features they wanted. The key features of the card being considered are as follows:
Annual Fee: No fee, $50, $100
Rewards: None, 1% cash back, 2% cash back
Car Rental Insurance: No, Yes with $100 deductible, Yes with no deductible
Interest rate: prime plus 8, prime plus 4, prime plus 2
Part 1: The VP of Marketing has suggested you conduct a survey of customers that asks customers what feature they would want in each category. Would such a survey work?
Part 2: What multivariate technique would be appropriate? Describe to your VP of Marketing who has no research experience how this multivariate technique would work.

Key points Part 1

- If the survey simply asked which features customers would want, the results would surely show that customers would want the best option for them in each category. Of course these are the options that would be the least profitable for Nofear.

Key points Part 2

- Conjoint Analysis would be recommended in this case. Customers would be shown a series of questions that asks them to choose between two potential packages of the four features or indicate if neither appeal to them. The resulting analysis will determine the importance of each feature and help to identify the combination of features, if any, that would best meet the needs of Nofear and its customers.
- However, if Nofear have already pre-determined the two or three credit card packages they want to go to market with, maybe simply using a monadic design with independent samples may be sufficient. This simpler test can determine which, if any, of the designed products has the best chance on the market, but would not provide as much information about the relative importance of product attributes compared to Conjoint Analysis.

Sample 10

Kooleo running shoes recently conducted a survey of male adults in Canada who purchase running shoes. The study found a correlation of -.8 between the following two questions:
On a scale of 1 to 10 where 1 is not at all likely and 10 is very likely, how likely are you to purchase a pair of Kooleo brand running shoes over the next 12 months?
On a scale of 1 to 10 where 1 is very frequently and 10 is never, please indicate how frequently you run.
Please comment on the questions and the correlation? What is the cause and what is the effect?

Key Points

- The negative correlation actually implies a strong positive relationship between frequency of running and likelihood of purchasing Kooleo brand running shoes.

Those who run frequently are also more likely to purchase Kooleo shoes. It would have been recommended that both scales run in the same direction to make the questionnaire easier for respondents to complete.

- The correlation itself does not imply that those who buy Kooleo shoes are more likely to be runners but intuitively this would be the more likely cause and effect relationship. It is possible though much less plausible that purchasing Kooleo shows will encourage respondents to run more.

Sample 11

Your client, a soft drink manufacturer, is considering launching a new sports drink in the Calgary and Vancouver markets. Taste test research found that 80% of 350 adult aged 18 to 35 years of age liked the product in Vancouver while only 72% of 400 adults in the same age range liked it in Calgary. Can you conclude that there is truly a difference in tastes between these two markets?

Key Points

- Standard error for Vancouver is: SQRT((80*20)/350) = 2.14
- Standard error for Calgary is: SQRT((72*28)/400) = 2.24
- Standard error of Difference is: SQRT(2.14^2+2.24^2) = 3.1
- z value for percentage (80-72)/3.1 = 2.58
- z is greater than 1.96
- You can be 95% confident that there is a true or statistical difference in tastes between the two markets, for drinkers within the same age bracket.

Sample 12

Your employer, Widgetop, manufactures machines that are used by companies to make widgets. Widgetop has enough development budget to implement only one of two enhancements this year. As the Research Manager of Widgetop, you conducted a survey of 200 of your 4000 existing customers to identify the value of each enhancement. Enhancement 1 was rated an 8.5 on a scale of 1 to 10 while enhancement 2 was rated an 8 on the same scale and the standards error is .19 for enhancement 1 and .23 for enhancement 2. Which enhancement do you recommend that Widgetop implement this year? Why?

Key Points

- Statistically you can conclude the difference is significant at the 90% confidence level (8.5-8)/(SQRT(0.19^2+0.23^2)) t=1.67; t is more than 1.65
- However, it is more common to adopt the 95% confidence level and therefore t would need to be greater than 1.96 to conclude the difference is significant
- Since there is a slight preference for Enhancement 1, it would be best to recommend it, all other things being equal. However, if there are any other considerations, such as lower production cost, weighing in the balance in favour of Enhancement 2, you should recommend it.

Sample 13

You are the Director of Marketing Research for a large Canadian wealth management company, Bigmula Management. Your company focuses on individual Canadians with a minimum of $100K in investments (about one million Canadians), though it offers more comprehensive services to those with over $500K and over $1 million. It is especially interested in data on those segments. It knows that individuals with $500K to $1 million in investments represent 20% of its market, while those with over $1 million in investments represent only 5%. You recently led a qualitative research project which successfully achieved the objective of identifying important qualities of a wealth management firm. The marketing team would like to know which of the 20 qualities is most important. Your marketing team wants information that is as accurate as possible. You have budget enough to complete 600 surveys. What is the population for this study? Would a disproportionate sample be the right choice for this survey? Why or why not? Would a disproportionate sample affect the overall reliability of the data on the population? What would the confidence interval at the 95% confidence level be for the population if 200 interviews were conducted with:

- individuals with > $100K to < $500K in investments;
- individuals with $500K to $1million in investments; and
- individuals with > $1million in investments.

Key Points

- The population is individuals with a minimum of $100K in investments or about one million Canadians
- Given that those with $500K to $1million in investments and those with over $1million in investments represent an important market, it would be important to have statistically representative results for these groups. Given that they only represent 20% and 5% of the market respectively, it would be desirable to oversample these groups to ensure a statistically reliable proportion of them are included in the sample.
- Disproportionate sample does not affect reliability
- Since this is the equivalent of a sample size of 266, the confidence interval at the 95% confidence level would be +/-6 for the population

Sample 14

You are the Research Manager for Bizum, a high end umbrellas manufacturer and retailer. You are conducting a research survey to better understand how to convince adult Canadians of the value of your umbrellas which are sold at a premium price to other umbrellas. You planned to conduct a survey of 600 Canadians across the country to gather the information you need and the cost would be approximately $100 per survey.

Part 1: In an effort to save money, your VP of Marketing has suggested that you focus on the BC market only since that is where demand for umbrellas is the highest. Furthermore, he suggests that since fewer people live in BC than in the rest of Canada, you could use a much smaller sample size (say 300) and have the same level of precision. How do you respond? Why might it make more sense to do a survey of 300 BC adults instead of a national survey?

Part 2: Your VP of marketing has had a change of heart (i.e. realizes that his budget is significantly under spent). He now suggests that you increase the sample to 800 but include proportionately more BC adults in the survey due to the importance of the BC market. Assume that BC represents only 10% of the Canadian population. Is it appropriate to include more respondents from BC in the results? Why or why not?

Part 3: You go ahead with the survey of 800 respondents and include 260 from BC. One of the questions in the survey is whether colour is considered when choosing an umbrella. The results of this question are shown in the table below.

Is colour considered?	**BC**	**Rest of Canada**	**Total**
Yes	230	320	550
No	30	220	250
Total	260	540	800

What percent of adults in BC consider colour when deciding on an umbrella to purchase?
What percent of adult Canadians consider colour when deciding on an umbrella to purchase?
What is the confidence interval at the 95% confidence level for BC and for the total results?
Are the BC results significantly different from the Rest of Canada results at the 95% confidence level?
Show all calculations

Key Points – Part 1

- Whether you sample BC or all of Canada, the same sample size would be required to generate the same confidence interval and level.
- With a representative sample of Canada, the results would be representative of all Canadians. Since the population of BC represents 10% of the population of Canada, the views of adults in BC would not figure strongly in the overall results and the number of BC adults found in the sample would be small (n=60 out of 600). If BC is a much more important population then a survey of 300 adults in BC would provide more reliable data on the BC market.

Key Points – Part 2

- If BC is a more important market, then it would be appropriate to have a sufficient number of responses in BC to identify any regional differences.

Key Points – Part 3

- 88% (230/260) of adults in BC say they consider colour
- 62% of Canadian adults say they consider colour – the calculation is as follows: Since BC accounts for 10% of the population we can divide the rest of Canada number to determine how much BC should count for in the national number. 540/.9 = 600 so the

BC numbers count for 60 in the total count. The BC numbers should be weighted by 60/260 or .23. .23 *230 = 53. (53+320)/600 is 62%

- The confidence interval for BC for a sample of 260 is approximately +/-6.1% SQRT(2500/260)*1.96
- The confidence interval for the national numbers based on a sample of 600 (540/.9) is approximately +/-4% (SQRT(2500/600)*1.96)
- Standard error for BC = SQRT((88*12)/260) = 2.02
- Standard error for Rest of Canada = SQRT((59*41)/540) = 2.12
- Standard error of difference = SQRT(2.02^2+2.12^2) = 2.93
- (88-59)/2.93 t= 9.9 (which is far greater than 1.96 and is statistically significant)

Sample 15

A new Marketing VP has been hired to help your research agency increase its market share. She has an excellent reputation in business development but has little experience in marketing research. She sees a big opportunity for your agency to leverage its experience in the financial services sector. You have been the primary research agency used by the second largest company in the financial services sector and she has learned that the industry leader, who currently uses your main competitor, is currently changing its research agency and has issued a Request for Proposal (RFP). The new Marketing VP has asked you to respond to this RFP. What are your obligations?

Key Points

- The MRIA standards do not give a client exclusive access to a research agency, however, there might be a contract between the agency and the client that does.
- It would also be a professional courtesy for the agency to inform its existing client that it may be working for the major competitor based on the outcome of the RFP. Furthermore, it should be expected that the existing client will wish to discuss this and may choose to change to another agency after discussing it.
- No material related to the existing client may be shared with the potential new client (even if the existing client is dropped) including briefs, specifications, raw sample, research data and findings (except in the case of syndicated studies).

Sample 16

The sales team has suggested enhancements to one of the company's core products based on feedback from clients. The VP of Marketing has asked you, the Head of Marketing Research, whether you would recommend marketing research be done prior to the decision being made to proceed with the enhancements. What information would you need before providing a recommendation? When would you recommend research and in what cases would you not?

Key Points

- The need for research should be decided based on the cost of the research compared to the risk of making the wrong decision. Before making a recommendation you would need to know the cost of the enhancements and the likelihood that the enhancements would have a negative impact on sales. If the costs are insignificant and it is certain that the enhancements won't hurt sales, then an investment in research may not be necessary. If the costs are significant or if a wrong decision could have an impact on sales, then research would be recommended.

Sample 17

Your client, a major magazine publisher, is looking to launch a new magazine called the Executive Reader designed for professional males over 40 years of age. A mock-up of the first issue has been created based on content identified in prior research. The first issue can make or break a magazine. Before it goes to print, the publisher would like to get some additional feedback on the content and design to ensure that it meets the needs of its intended target audience. You agree to conduct two focus groups in each of the magazine's three major markets: Toronto, Vancouver and Calgary.

Part 1 - What questions would you include in the screener?

Part 2 - Develop an outline of the discussion guide?

Part 1 - Key Points:

- Readership or interest in similar magazines/publications
- MRIA Code of Conduct and Good Practice requires screening for:
  - Not working now or previously in the industry (publishing), nor advertising, marketing, research, public relations, or media
  - Not having participated in a group discussion or in-depth interview on the same topic in the past two years
  - No respondents should know one another
  - No respondents may be recruited who have attended groups/in-depth interviews in the past 6 months; nor five or more groups or in-depth interviews in the past five years
  - At least one third of the respondents recruited must never have attended a group discussion or in-depth interview before
  - All respondents must have been living in the specified market area for at least the past two years
  - All respondents must be able to speak, read, or write in the language of the group being conducted

- Further, the screener should indicate:
  - the date, time and exact location,
  - the length of the interview period
  - the importance of punctuality
  - The payment (and any associated terms)
  - The importance of not bringing children/others to the groups
  - The fact they may be rescreened prior to the discussion
  - That they will be asked for identification at the facility

    - That they may be asked to complete pre-session exercises before the session.

Part 2 – Key Points:

- Moderator must explain to all respondents at the commencement of the groups:
    - The presence and purpose of the one-way mirror, the video recording, and the audio recording
    - The confidentiality of the respondents' identities, unless they otherwise acknowledge and agree, in writing, to their personal information being disclosed to other organizations
    - The proceedings are confidential, and it is understood that the respondent will keep the nature of the proceedings confidential.

- Focus group discussion guide could include a number of topics asking about readership of similar publications, presentation and evaluation of the new concept, interest in reading/subscribing to it themselves, etc.

Sample 18

Your research firm, XYZ Research, has recently conducted some research on behalf of Student Power, a reputable and well known lobby group in Ontario that has been fighting to have the government reduce college and university tuitions. One of the findings in the survey was that 95% of adults in Ontario agreed (somewhat or strongly) that reduced college and university tuition would benefit Ontario in the long term.

Your client was excited about this finding and is eager to promote it through a press release.

They have asked you to review their press release. An excerpt of the draft press release appears below.

New XYZ Research Study Proves That Ontarians Want Tuitions Cuts Now

A research survey of Ontario adults conducted by XYZ Research on behalf of Student Power proves that the views of Student Power are in line with the citizens of Ontario. Student Power has long been demanding a 40% cut to tuition rates and this recent survey shows that virtually all (95%) of Ontario adults agree. Respondents clearly stated that a reduction in tuition is essential to the long term success of Ontario.

What parts of the release would you ask your client to change and why?
If your client refuses to make these changes, what should you say?
Describe some of the information that your client must be willing to make available to the public when publicizing this study.

Key Points

- Research findings must only state what is found in the study (it doesn't say that the views of Student Power are in line with Ontarians; it doesn't specify the percent of the tuition cut and respondents didn't say that this was essential)
- If your client refuses, you must demand that your name not be used in any public use of the results
- Client should be prepared to release to the public: dates of interviewing; methods of obtaining the interviews (in-home, telephone or mail); population that was sampled; size and nature of sample; size of the sample upon which the report is based; and the exact wording of questions upon which the release is based.

Sample 19

A new company, YXZ Software Inc, a distributor of a line of financial planning software, has a very large and current customer database that it compiled from warranty registration forms over the past year. Registration is mandatory to activate the software so the database includes all customers. Unfortunately, the VP of Marketing at YXZ never thought to ask for information other than name, e-mail address, phone number and mailing address on these forms. She would now like to know where customers purchased the software and their general interests so that she can better target YXZ software advertising. You have previously done some research for YXZ to test packaging designs and the company was very happy with the research you did. As a result, the company has asked you to recommend some additional research. What type of study do you recommend and why?

Sample 20

The Metro Food Bank (MFB) is a not-for-profit organization dedicated to supplying food to those in need in larger cities across Canada. It has a very limited budget and aims to use no more than 5% of budget to cover marketing and administration costs. Its goal is to spend 95% of the money it raises on providing food to those who need it. The Executive Director of MFB has learned that a similar charity that provides shelter to the homeless has recently completed a survey with its donors to understand how to make them into repeat donors. Their research has resulted in a significant increase in the number of donors for their shelter. Although she has no room for research in her budget she can see significant value in this kind of survey and would like to proceed with it. If she includes a question in the research study that asks respondents as the very last question: "Would it be okay to contact you to discuss donations to MFB?" then she can charge the survey as fundraising. You are the Account Manager of a large research firm and she has asked you to respond. What is your response?

Key Points

- Research surveys must never be combined with fundraising. See MRIA standards for FUGGGING

Sample 21

Two months ago, Nature Snacks Inc., a small, snack food manufacturer launched a new line of chips made from oats called Chipoats. The product is similar in taste to potato chips but is healthier than potato chips. The product was launched based on new product development research you, as the Moderator, did for Nature Snacks Inc. Your research involved a series of 10 focus groups across the country to evaluate both the name, packaging and taste of the product. In your report you noted that despite some concerns over the name and product description, the vast majority of participants liked the packaging. More importantly, during the taste tests, virtually everyone raved that this was the best tasting snack food product they had ever tasted. Unfortunately after two months, sales have been dismal. The VP of Marketing for Nature Snacks is eager to improve the fortunes of this product. The traffic on www.NatureSnacks.com is very good and he would like to use this as a tool to promote the product. He remembered that the taste tests you conducted were videoed and he is convinced that the testimonials to the taste of the product would help to improve product sales. He has asked you to contact research participants to determine if the videos could be placed on their website. He'd also like to report that 95% of those who participated in the research liked the product. How do you respond? What suggestions do you give your client?

Key Points

- Video recordings for research purpose must be used for research purposes only and cannot be used for advertising. You could suggest that a separate taste test with reals consumers that is for advertising purposes be conducted or that a video be shot using actors
- Percentages and numbers should never be used or reported for focus groups results
- You could suggest that a formal survey (mall intercept or in-home taste tests) be conducted to determine the proportion of the population who like the taste of the product. That percentage could then be used in advertising.

Sample 22

You, as the Moderator, have just completed 16 focus groups across the country on behalf of your client, Kronk Kola, a leading Canadian cola manufacturer. Two groups were conducted in 8 Canadian cities, one with Kronk drinkers and one with those who preferred the market leading competitor, Plunge cola. Participants were asked to evaluate three different designs and compare them to the current design. The VP of Marketing at Kronk was extremely pleased to see that two of the new designs rated well above the competition and the existing design. He was also pleased to see that his favourite of the new designs was preferred by almost everyone over the rest. At the completion of the groups the VP of Marketing sent you an e-mail indicating that one of his assistants kept tabs on the number of people that liked each brand. He sent the percentages to you and asked if they were consistent with your numbers. He also asked that you include them in your report. What is your response? Would you recommend additional research? Why or why not?

Key Points

- The purpose of the groups is to gauge reaction to the designs and not to determine the percentage of those who prefer one design over the other. Percentages should not be reported.
- Discussion of limitations of qualitative research
- Additional research should be recommended if greater certainty is needed to quantify which design should be selected (e.g., major costs to changing and/or major risk to market share with wrong design).

Sample 23

It is late Friday afternoon and your research firm will be conducting nine focus groups the following week on behalf of your client, a large financial services company. The recruiting has been going well. When you spoke with your Recruiting Manager early in the day, she indicated that ten participants have been recruited for eight of the groups and they were just looking for one more for the final group. Just as you are about to leave for the day, your Recruiting Manager calls and indicates that there has been a small problem in the recruiting. As part of your firms' normal quality control procedures, she was listening in on a Recruiter who was asking a friend, who clearly didn't meet the group requirements to agree to be the last participant in the group. When your Recruiting Manager approached the employee, he indicated that he had never done anything like this before but was hoping to fill this last spot in these groups so he could cut out a little early. This same recruiter recruited 14 of the other participants in your groups. What do you do?

Key Points

- Have this recruiter be taken off the project and discuss with your Recruiting Manager what disciplinary actions need to be taken.
- Take the following corrective actions:
    - Confirmation calls should be made immediately to all 14 recruited participants to verify if they met specifications. If not, their participation should be cancelled and others recruited.
    - If the participants do not meet criteria, the groups should be rescheduled and the client informed immediately of the situation with information on the solution and impact on the schedule of groups.

Sample 24

You learn from one of your Call Centre Supervisors that one of their Interviewers was completing an interview with someone who was clearly not in the target sample for a study being conducted for one of your clients. The Interviewer admitted that he called a friend because he was concerned that his number of completes on this shift was too low. He also indicated that he had never done this before and the other 100 interviews he completed were fine. The top line of the results is due to the client the next day and without these 100 interviews the top line report will not be ready and therefore be delivered late.

Key Points

- Have this interviewer taken off the project and discuss with your Call Centre Supervisor what disciplinary actions need to be taken.
- Have other interviewers re-interview a sample (at least 10%) of the 100 interviews completed by this individual. If important differences are found between the verified interviews and the original ones, remove the remaining unverified interviews and replace them entirely in the final data.
- Inform the client of the situation as soon as possible and explain what corrective measures have been taken. Indicate that any additional interviews will be conducted at your cost.
- Explain the impact on the overall project timeline. Ask the client whether they want the top line for the interviews already completed and those verified (but without the unverified interviews).

Sample 25

A client wishes to have you, as a Moderator, conduct focus groups for three new types of cookies that it is developing. The formula of the new product is top secret. Your client would prefer not to share the ingredient list with participants in case the competition was to be recruited. Your client has indicated that all three varieties contain nuts and wants to make sure that no-one with a nut allergy participates in the groups. How do you address your client's concerns and requests in accepting this assignment?

Key Points

- The screener should identify the possibility of nuts being in the product, but the screener can be vague. The screener should indicate that food will be served, and eliminate anyone who has a peanut allergy or a food allergy of any kind. The ingredient list must be available to respondents if requested during the group but they need not have a copy in advance or one they can take back with them.
- The screener should be used to minimize the risk of a competitor showing up by carefully screening for occupation – standard industry screeners as well.
- The screener should also cover usage questions so as to have likely purchasers in the groups.

Sample 26

You are the Manager of Marketing Research for ABC Direct, a computer hardware manufacturer and retailer. One of your primary research suppliers, ZYX Research, has just finished the fieldwork on a quantitative study that it is being done on your behalf. The purpose of the study was to assess customer satisfaction with your new premium laptop computer model called the X-85. A representative sample of 500 customers completed the survey. Respondents were asked them to rate their overall satisfaction with the X-85. The survey also asked them to rate both the importance of and their satisfaction with several attributes related to their purchase of the X-85. In advance of the full report, ZYX has provided you with the top line results as shown below.

Percent stating	Very Dissatisfied				Very Satisfied
	1	2	3	4	5
Overall Satisfaction	5%	10%	10%	35%	40%

Percent stating	Very Dissatisfied				Very Satisfied
Satisfaction with Attribute	1	2	3	4	5
Quality	5%	5%	23%	43%	24%
Customer Service When Buying	11%	25%	33%	22%	9%
Customer Support After Purchase	25%	25%	15%	15%	20%
Value For The Money	15%	15%	15%	25%	30%
Delivery	24%	5%	25%	16%	30%
Ease Of Set Up	4%	5%	11%	50%	30%
Design	3%	17%	30%	35%	15%
Portability	1%	5%	15%	39%	40%

Percent Stating	Not at all Important				Very Important
Importance Of Attribute	1	2	3	4	5
Quality	4%	8%	15%	33%	40%
Customer Service When Buying	1%	6%	23%	40%	30%
Customer Support After Purchase	20%	25%	25%	20%	10%
Value For The Money	5%	8%	15%	55%	17%
Delivery	16%	5%	44%	35%	0%
Ease Of Set Up	11%	4%	33%	35%	17%
Design	2%	5%	7%	35%	51%
Portability	5%	8%	15%	22%	50%

Part 1 - List three of the key findings of the research based on the topline results shown above.
Part 2 - What additional analysis, if any, would you ask ZYX to provide and why?
Part 3 - Your colleagues in marketing were surprised by a few of the findings (lower than expected ratings on design, deliver, customer support and customer service) and have asked you to lead some additional research to determine why customers have rated these items this way. What additional research do you recommend and why?

Key Points – Part 1 (Note that there are many more key findings that could be listed. These are just three examples.)

- Difficult to determine the satisfaction rating is good or bad without baseline comparison.
- Although the scores for satisfaction with some key attributes are very low, overall satisfaction is fairly high. These poorly rated attributes are likely not key drivers of satisfaction for existing customers.

- Satisfaction with customer support after purchase is an example of an attribute that is not highly rated and is also rated very low in importance to many customers
- Although the score for satisfaction with design is reasonably high, it is the most important attribute to clients and may be worthy of improving.

Key Points – Part 2
- Regression analysis of attribute satisfaction and overall satisfaction to determine which attributes are the major drivers of satisfaction.
- Correlation analysis could also be used.
- Should consider different models of customer satisfaction that link satisfaction, or loyalty back to purchasing intent or revenue.

Key Points – Part 3
- Qualitative research because it would allow you to explore in-depth the reasons why respondents answered the way they did.

Sample 27

There is a potential of adding to your company's base of market knowledge. How? By having employees, especially those in the field, feedback information about your competitors. Imagine, for a moment, if all of your company's employees were to provide meaningful CI on a regular basis. Information about product launches, new training programs and pricing strategies. Imagine how more timely and effective your marketing decisions would be. The first groups of people to be trained are sales reps, as they are in regular contact with other company reps and buyers who also do business with your competitors.

Your Director – Business Intelligence has asked you to come up with 5 to 7 key guidelines for the reps to follow when collecting CI. He emphasizes the absolute necessity that the reps collect the information ethically, which means no misrepresentation (pretending to be someone else) or underrepresentation (asking for information without telling why you want this information). What would you come up with?

Key Points

1. Do not seek to obtain trade secrets belonging to another company or organization.
2. Do not seek to obtain CI from a third party if you believe that information may have been wrongfully obtained.
3. Do not misrepresent your identity or use false pretexts of any kind, to obtain CI.
4. Do not ask a job applicant who works or worked for a competitor for confidential information about their company.
5. Do not dumpster dive, i.e. go through a competitor's garbage.
6. Do use deductive problem solving to fill-in gaps in competitive information that cannot be found through open-source collection and ethical inquiry.

7. If you are uncertain about the ethics of an issue, speak to your manager before proceeding.

Sample 28

As with more information based sciences, CI is evolving. In the past few years, for example, CI reporting has been made simpler and easier to read with the popularity of Power Point slides. Training has moved from classroom to 45 minute online modules for employees to learn how to collect and report CI they come across in the market. Awareness that dashboard packages are no substitutes for a formal CI program emphasizes human intelligence from knowledgeable sources and increases understanding that much of the information needs can be met by developing a network of communication within an organization.

Where do you see CI evolving in the next few years? Why?

Key Points

In the next few years, the following will take place:

- CI will be more streamlined. For example, tools to see into various social networking sites, professional organizations, corporate and government sites will be commonplace.
- Greater vigilance by companies on preventing sensitive information being leaked by their own employees.
- More push for CI by senior managers, since many in their previous roles as middle managers will have used CI.
- There will be greater embrace of CI by non-profit organizations. For example, health charities will need to know who else is planning a major gift campaign, while crown corporations expanding into overseas markets will need a better understanding of whom they will be competing against for new business.
- There will be an expanding role for competitive information from beyond one’s country, industry and language, so that foreign language skills as well as knowledge of developments in other industries and countries will become increasingly important if not essential.
- The average horizon for CI will expand beyond the immediate and near term.
- In a process that has already begun because of demand from senior management, information from CI, traditional market research and other sources will increasingly merge to make information sourcing more cost effective, thus reducing the rivalry between CI and traditional market research.

Sample 29

Writing a CI plan, like any other business plan, is an exercise that provides value and learning. Not only will you be forced to define the role that CI will play in your company, but it will also define the framework (e.g. people, time, budget, etc) in which the program will run. For the past few years, you have been responsible for writing your company’s

CI plan. You recently hired an analyst and now it is her job to write the plan. What tips would you give to help her?

Key Points

- Keep your plan concise. This will ensure that more people will take the time to read the plan, and that it will not take an inordinate amount of time to update it.
- Speak to a CI manager in a non-competing leading edge industry that embraces CI to learn which factors have contributed to their success in setting up a CI program.
- Assume that you will not be able to meet everyone's expectations. The best approach is to work out a compromise with those who will make use of the CI that you provide. Often an internal survey will uncover people's true expectations and beliefs. Make every effort to conduct one and to communicate the results with your stakeholders before embarking on a CI program.
- Make sure your CI plan is linked to your marketing plan. For example, if the primary objective or your marketing plan is to achieve 5 percent growth for each of the next three years, your CI plan should include specific strategies to help achieve this goal.
- Make sure you list the key deliverables (e.g. customized analytics, templates for reporting CI, online CI training modules, guidelines for conducting CI ethically, etc), as these will serve as a benchmark when gauging the effectiveness of your program.
- Keep in mind that no matter how well conceived you plan is, success will ultimately depend on your ability to market CI to your stakeholders and their subsequent effort to make decisions with the competitive information.
- Include a timetable for feedback from stakeholders on their assessment of the CI they are receiving. Ask:
    - Are they getting the CI they need?
    - Are they reading the CI you sent them?
    - Are better decisions being made as a result of the CI?

GOOD LUCK! YOU CAN DO IT!