
Case: Calling Up Attendance

Abstract: This case examines a study by Prince Marketing for TCS Management Group. TCS Management Group, Inc., part of Aspect Communications, is the leading provider of workforce management software, especially related to call center management. The study discusses measures of customer satisfaction and aims to predict attendance at a two-day educational event, Users Forum.

URLs: www.pmresearch.com; www.aspect.com

How/When to Use:

This case has numerous tie-ins to various chapters. Used with Chapters 4 and 5, you can build the management-research question hierarchy. Used with Chapter 6, your students can build the research process model up through data collection. Used with Chapter 14, you can discuss sample frames, and screening for qualified respondents, as well as various methods for drawing a sample from a sample frame (customer list). Used with Chapter 11, you can discuss the types of data being collected as well as reliability and validity issues. Used with Chapter 13, you could discuss why a rating scale is appropriate to evaluate customer service and likely attendance. Used with Chapter 10, you can discuss the appropriate communication methods. Used with Chapter 15 and 16, you could discuss preliminary analysis planning. Used with Chapter 17, you could discuss what to do with the 16% of the sample that felt ill-equipped to answer the issue questions and what preliminary analysis would be appropriate to answer the management questions.

Discussion Questions:

1. Build the management-research question hierarchy.

This question gets the student in the habit of formulating the management-research question hierarchy (Chapter 4 and 5) as the beginning step of a research project. The management dilemma facing TCS is how to prepare for the scheduled Users Forum when it doesn't know what specific presentations to build into the program, nor how many people to expect at the Opryland Hotel event.

- **Management questions:** What topics should be addressed in the presentations or materials distributed at the Users Forum? How should solutions be delivered, given the attendance expected (written materials? whole session devoted to the issue?)?
- **Research questions:** What issues cause the most concern among the current users of the TeleCenter System software? How many current users see attendance at Users Forum as a viable means to address troublesome issues, such as ease of use, technical support access and responsiveness?
- **Investigative questions:** What is the current users' evaluation of customer service, especially on ease of use, software-generated reports, technical support service, and effectiveness of software for its intended purpose? Who, if anyone, from a current user's company will attend the Users Forum? Do new users of the software have different concerns than more established users? How many representatives from a single company may come to the Users Forum? What type of respondent (user or manager) is most likely to attend the Forum? Do the different types of respondents have different concerns with TeleCenter System software?
- **Measurement questions:** We don't have the actual instrument, but we know that Prince Marketing collected information relative to investigative questions using a 7-point rating scale, where "7" was the most positive on the scale. We also know they were able to classify the respondent as a software user or call center manager.

2. Discuss the communication methodology chosen.

The obvious choice, as indicated by Exhibit 10-2, is the telephone interview. Because TCS needs the information in a relatively short amount of time, one must exclude personal interviewing as a collection method. Given the technical skills of the respondents, self-administered via computer was a possibility, if TCS had e-mail addresses or Prince felt the response timeframe would be met. Prince Marketing chose a phone interview because of the ability to control the process and meet their three-week promise, but also because of the limited number of data variables they were collecting. They could choose any of the three methods (human, CATI, or computer-delivered), but human-administered definitely gives Prince and TCS the most control. CATI, however, gives the telephone interviewer the ability to enter the responses in process, permitting Prince to tally the results more quickly, possibly making them available to TCS in real time, so they could prepare for presentations without waiting for the formal estimate of attendance.

3. Develop the preliminary analysis plan.

The request for a preliminary analysis plan relates well to Exhibits 16-1 and would be fairly simple for this study. TCS would want to frequencies on the attitudinal-scale variables. And we would want to cross-tabulate such variables by whether the respondent definitely would be, might be, or definitely would not be in attendance at the Users Forum. Frequencies (or cross-tabulated frequencies) would tell us the most pressing issues, assuming Prince has done a good job of anticipating issues in the design of the data collection instrument or was able to transform the data during data preparation into homogenous groups of responses on issues. We also want to be able to predict attendance, so we would want frequencies on the attendance variable, as well as their interest in more information about attending the Users Forum. Hopefully we can cross-tabulate this information against classification variables such as industry of the firm and years of software use that would be readily available from the customer database the TCS provided to Prince Marketing.

4. How will you deal with the 16 percent of the sample who are new to the software?

In data analysis, the new users who felt ill-equipped to evaluate the software ease of use question (16% of the sample), would likely not be included (counted as missing cases) in the analysis of this issue. However, their likely attendance could still be important to the prediction of attendees overall. If some of these new users did identify software installation, technical support, or use concerns, you could cross-tabulate a status variable (new user vs. established user) against the various issues variables. Such data exploration actions may very well lead to Users Forum sessions exclusively designed for new users.

5. Discuss the advantages and concerns of incorporating or closely linking research activities with marketing activities.

You can use this question to discuss the practice of *sugging* (sales under the guise of research). You could also tie this question back to Chapter 2 and the subject's right to privacy. The issue of incorporating marketing promotion within the context of customer satisfaction research is commonly done, although it can be a two-edged sword. From a marketer's perspective, you have a potential attendee on the phone and you could efficiently use his or her time by telling them about the Users Forum. From a professional researcher's perspective, such a combination use of the survey is totally inappropriate and contributes to the growing refusal rate among potential respondents. If research is accompanied by a sales presentation, potential respondents have the right to be angry when they agreed to participate only in a survey. Such a change in orientation and purpose is a violation of the subject's right to privacy.