

How To Move a Mountain: Six Rules for Changing Tracking Studies

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Tracking studies, in which the same market research is deployed periodically over time, have become the cornerstone in marketing and strategic planning. Companies find that such studies allow them to observe the impact of, and react quickly to changes in business practices, competitive shifts, and new product or service introductions. For example, many companies study customer satisfaction on a periodic basis, using market research to detect changes in satisfaction levels, or reward staff in meeting defined metrics or making improvements toward customer satisfaction goals.

Changing to Adapt to Business Realities

However, executives are often faced with situations that may generate the need for changes to a tracking study, but they still want to compare new results with those from the past. For example, new technology may be introduced into an industry, resulting in a change in competitive environment and customer expectations. While research orthodoxy often says that these studies can't be revised and still support comparisons with past results, this theory does not meet the needs of business reality. How, therefore, can the study be changed while also maintaining its consistency? In other words, if the study is revised, how can we compare current results with those from the past?



When considering these questions, it appears that modifying a tracking study is as difficult as moving a mountain. No wonder so many marketing executives stick with what they have – a survey that may no longer meet the needs of their organization.

Some clients have come to us with just this problem and we've worked with them to achieve the needed change, while allowing them to preserve the integrity of comparisons to previously gathered data. The two main questions we've found that are key to successfully updating these studies are:

- *When does such a change make sense?* Study revisions may involve considerable resources in terms of both cost and time, and marketing professionals need to discern those times when alterations are warranted and those when the old questionnaire can be maintained.
- *How can a study successfully be modified, while still preserving a manager's ability to continue to observe trends in the results?* What are the factors that should be considered and how can barriers to change be overcome?

When To Change

Not all business changes require amending a tracking study, but some internal and external influencers can fundamentally alter a business model or a strategy, making study revisions worth considering:



Competitive Shifts: For example, when a competitor introduces a new channel into its distribution mix, new opportunities for sales are created, but the dynamic of the customer experience and the forces of the purchasing environment may be drastically influenced. By adding in a few questions to a sales tracking study, you may be able to gauge the impact of this change on both your customers and those of your competitors. Additionally, you can determine the effectiveness of this introduction before making what could be a costly decision yourself, with unknown results.



Change in Market Forces:

Many small or medium-sized businesses often initially concentrate on sales growth.

However, a maturing market that requires you to shift away from growth, toward establishing greater market share, has implications for your salesforce and how it impacts the

customer. In this case, you may want to alter studies that track market share to add in new metrics or alter existing measurements.

Revisions to the Business Model: As businesses grow, they may revise their business models to accommodate those that are more relevant to their customer. For example, companies in the healthcare, biotechnology and pharmaceutical industries sometimes convert from a “push” strategy of marketing to doctors and practitioners, to a “pull” strategy where they market to the end user or consumer. This change can influence consumer perception of the company or brand, and executives need to understand how these changes may impact sales and the bottom line.

Customer Changes: As companies become more dependent upon their websites for customers, they open themselves to a younger, more techno-savvy demographic. This customer may have different expectations or values than the non-internet customer, and sales variables may be different as well. Similarly, new audiences may result in new challenges relating to customer retention, and companies need to respond quickly to changes in their customer base.



How to Change

Any of these changes are valid reasons for a tracking study reevaluation and possible revision. The trick is to alter the study in such a way so that historic results can be preserved and compared with those in future study waves. We've found six elements that factor into successfully modifying tracking studies that have helped our clients to navigate these necessary revisions.

Pre-test to limit changes. It is difficult to anticipate changes before implementing a tracking study, but you can limit the need for future modifications by making sure that your tracking is relevant at the outset. By pre-testing your initial study among a small group of customers, you can observe whether the current design meets their needs, while gaining insight as to how their needs may change in the future. Alternatively, you can conduct a focus group exploring current assumptions before incorporating decisions requiring later revisions.



Test the change. One strategy is to simultaneously run the original study concurrently with the revised study to different sets of customers, and observe any changes that result from the two instruments. You may notice the difference is not substantial, or it may be dramatic. Either way, you will be aware of the potential impact before any study alterations are executed on a broad scale.

Limit the frequency. Too many changes will likely skew results, regardless of how thoughtfully the modifications are made. Review and consider changes to your study on a periodic basis to minimize the number of revisions. The table below offers some guidelines for the maximum recommended change frequency.

Recommended Study/Change Frequency

Study Frequency	Review/Change Frequency
Weekly or more frequently	Once every six months
Monthly	Once a year
Quarterly	Once every two years
Annually	Once every three years

Place additions at the end. If at all possible, place new questions at the end of the study. Since respondents will be exposed to the unchanged aspects of the research before anything new is imposed on them, the impact on the majority of the survey results can be minimized.

Keep some questions the same. Some major questions should be kept consistent. We worked with one client, a large financial institution, to make significant changes to its customer satisfaction survey. We decided to maintain strict consistency, though, on the question relating to overall satisfaction.



Even a slight change to the wording of some questions can change results and compromise the ability to track these data. In cases such as this, it is probably better to live with a less-than-perfect question than to make a revision.



Keep scales consistent. There is a difference of opinion as to the best type of rating scale. For example, some surveys anchor the ends of a scale only (“Please evaluate this product on a scale of 1 to 5 where ‘5’ is excellent and ‘1’ is poor”) while other surveys anchor every point (“Please evaluate this product on a scale of 1 to 5 where ‘5’ is excellent, ‘4’ is very good, ‘3’ is good...etc). Still

others do not anchor at all (“Please rate this product on a scale of 1 to 5”). Regardless of the scale chosen, this is one aspect of your study that should be carved in stone. A change in rating scales will fundamentally alter results so that they can not be tracked.

By carefully considering changes to tracking surveys, and making these revisions judiciously, executives can maintain the validity of the study and preserve the ability to peel away at the changing needs of their business.



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