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Chapter 2
The Research Process: An Overview

CHAPTER LEARNING OBJECTIVES

After reading this Chapter, students should understand…case

1 The standards of good research.
2 What is happening within each stage of the research process.
3 Research process pitfalls and their solutions.
4 Ethical Issues at each stage in the process.

The Chapter provides an overview of the research process (briefly introduced here then discussed more deeply in subsequent chapters). This process guides the organization of the remainder of the book.

KEY TERMS

Key terms are shown in **bold,** as they appear in the text, throughout the lecture notes.

POWERPOINT

- A complete PowerPoint slide set comes with this chapter.
  - Slides are ordered as the chapter is organized.
  - Each, at minimum, contains the following:
    - Learning Objectives slide
    - Pullquote slide, key thought that opens this chapter
    - Exhibit slides, one or more per exhibit
    - Additional slides that cover critical concepts not covered by exhibits
    - Key Terms slide(s)
    - Additional Discussion Opportunities slides: You can arrange these slides within the slide set as desired. This slide section contains several types of slides; suggestions for using these slides are in the *Discussion and Project Ideas* section of this manual. The slides include all or some of the following:
      - Snapshot slides, one for each Snapshot; contains an image or graphic to serve as a visual anchor for the discussion.
      - PicProfile slides, one for each PicProfile; contains the image.
      - CloseUp slides, at least one per CloseUp; contains the images or graphs.
      - Additional Pullquote from thought leaders, at least one per chapter
      - PulsePoint: a statistic drawn from a research project that relates to some chapter concept.

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TEST BANK

The test bank for each chapter contains the following:

- Multiple-choice or true-false objective questions of one or more types, with answer noted in RED:
  - Definition-based questions on key terms and concepts
  - Application-based questions posing decision scenarios
  - Application-based questions asking for justification or explanation
- Essay Questions, with one possible answer noted in RED.

CONNECT

Connect is the location for several resources:

- **Quiz questions**
  - You select from this additional set of multiple-choice and true-false questions for each chapter to create a self-assessment quiz for that chapter. Each question provides a pop-up learning note for the correct answer, that you may opt to show (or not).
- **Connect Library for Instructors**
  - PowerPoint Slide Sets
    - Instructors often modify these sets to reflect their own teaching style and pedagogy for a chapter's material; you may opt to share these sets (or not) with your students, as presented or modified.
    - Each slide sets contains the graphical exhibits contained in the text.
  - Instructor's Manual for each chapter
  - Test Bank for each chapter
  - Written and video cases
  - Additional Materials Related to Cases (e.g., case discussion notes, data sets, video material, etc.)
  - Additional Materials Related to Chapters
  - Supplemental appendices on topics you may want to assign related to a chapter.
    - *APP-How the Industry Works-BRM13e.pdf*
  - Supplemental chapter-related materials
    - *BRM 13e_IM_Appendix How the Research Industry Works.doc*
  - Sample Student Project
  - Excel Chart Templates
- **Connect Library for Students**
  - Written and video cases
  - Additional Materials Related to Cases (e.g., data sets, video material, etc.)
  - Additional Materials Related to Chapters

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- Supplemental appendices on topics.
- Supplemental chapter-related materials
- Sample Student Project
- Excel Chart Templates

SMARTBOOK

This is a, digital version of *Business Research Methods*, which can be accessed online via laptop. It is linked to *Business Research Methods*'s Connect features. The content of *Business Research Methods* SmartBook is the same as the printed version of *Business Research Methods* but the digital features help focus a student's learning on particular book content. Students pay for a subscription to *Business Research Methods* SmartBook for the duration of your term or semester.

- As the instructor, you may assign Business Research Methods SmartBook or students may choose to subscribe to SmartBook on their own.
- If you want your students to have access to Business Research Methods SmartBook and its learning features, you will need to set up your Business Research Methods Connect course.

DISCUSSION AND PROJECT IDEAS

- **Snapshots**
  - ***New Moms and Moms-to-Be Offer Video Insights***…reveals the work of Marcus Thomas LLC and QualVu to use uploaded participant video to understand the issues of moms.
  - ***Research and Programatic Algorithims***…reveals how programmatic ad buys use research.
  - ***Is Your Research Project Leaving the Country?***...discusses the ethical issues related to outsourcing research services.
- **PicProfiles**
  - ***Emerging Research Techniques graph*** …showcases information from the 2016 Greenbook Research Industry Trends (GRIT) report that serves that the guide for research done for this edition of *Business Research Methods*.

- **PulsePoint:** Published research reveals many ways that businesses use research. You might use such research findings to discuss a current phase of the research process or a current issue.
  -
  - Use this statistic to build a discussion around how an organization could research the positive and negative effects of doing thorough background checks on all potential hires. There is a sizeable cost (money, time, manpower) associated with such background checks, so make sure students factor in this information into their analysis.
    - **49**… The percent of hiring managers who discovered a lie on a résumé .

- **Pull Quote:** Use each Chapter's pull quote to discuss a current issue related to the Chapter.
  - Use this quote to discuss people's attitudes about privacy and how it might affect research.
    - "Today individuals increasingly keep their emails and documents on remote servers in data centers—in short, in the cloud. But the transition to the cloud does not alter people's expectations of privacy."

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Brad Smith, president and chief legal officer
Microsoft

- This quote deals with the essence of data collection. Many of our businesses' top executives lead by asking questions rather than providing answers. You can use this quote to ask students what makes an excellent question. What you want them to say is questions that help discover the right research question and ones that should be asked to reveal plausible courses of action that can guide the research design.
  - "Learning to ask empowering questions—especially in moments of crisis—is a critical skill that will ultimately shape the meanings you create.

    Anthony Robbins, founder,
    Robbins Research International, Inc.

- You can use this quote to discuss the breadth of the concept of listening and how businesses listen to their various constituencies. You can also use it to discuss the pitfalls of listening; for example, listening for the wrong information (failing to clarify the research question correctly) or listening to the wrong people (failure to adequately define the sample).

  - "Listening is the front end of decision making. It's the surest, most efficient route to informing the judgments we need to make."

    Bernard Ferrari, consultant, Ferrari Consultancy, LLC,
    and former director at McKinsey & Company

- **WWW Exercises**
  - Learn more about business intelligence from industry leader MicroStrategy. Visit its website and participate in a free Web seminar on a current case study.
    - http://www.microstrategy.com/events/online_seminars/
  - Quirk's is one of the most respected magazines reporting on research topics. Visit its website and identify an article on a topic of interest. Use your library article resources to access the article. Tie the content of the article to one or more concepts within the first four Chapters of this text.
    - www.quirks.com
  - The Greenbook Blog is often on the cutting-edge of research methodology discussions. Use one of the current blog posts to identify an issue, then have the students use article databases to broaden their understanding of the issue.
    - http://www.greenbookblog.org/

- **Class discussion or research project:**
  - Use the exercise slide from your PowerPoint deck for Chapter 2 or write the following proposal on the board, then ask students to brainstorm about what else may be contributing to the lack of growth at BankChoice.

    BankChoice, currently the leading bank in the city, has not been growing as fast as its major competitors. Before developing a long-range plan to enhance the bank's competitive position, it is important to determine the bank's present competitive status, its advantages and opportunities, and its major deficiencies. The primary objective of this proposed research is to develop a body of benchmark information about BankChoice, its major competitors, and the market for banking services.

    - Suggestions:
      - The demographics of the bank's customers are changing. For instance, are the customers part of an aging population with less income? Is the neighborhood around

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the bank becoming more ethnically diverse? (Some ethnicities may prefer to deal on a cash basis.)
    - The job market is changing. For instance, is the town very dependent on a factory or a military base that has just closed?
    - Recent news stories about identity theft and security breaches have caused the general public to distrust banking institutions.

- Use the exercise slide from your PowerPoint deck for Chapter 2 or write the following dilemma on the board and then have a class discussion about the angle from which a research study and the subsequent report would be presented. This exercise will help students better understand the concept of "audience."

    - Dilemma: There has been a recent surge in automobile tire failures, which has resulted in automobile accidents, injuries, and deaths.

    - Audiences: (a) The tire manufacturer. (b) A new car dealership. (c) Any individual considering a new car purchase. (d) Any individual who already owns an automobile with this brand of tires. (e) Any individual who was injured during a tire failure incident.

- Chick-fil-A is known for its unique approaches to business. It has two HR policies that get a lot of attention:

    - Company policy mandates that all Chick-fil-A restaurants are to be closed on Sundays so consumers and employees alike can attend religious services.

    - The Leadership Scholarship Program offers Chick-fil-A employees reimbursement for college tuition with $1000 awards for nominated employees.

    The student's task is to examine one of these policies with respect to its effect on future sales and profits. Have them visit the Chick-fil-A web site (www.chickfila.com) to learn more about the policy. Have them outline their thoughts on the management dilemma, management question(s), and research question(s) facing Chick-fil-A because of the chosen policy and report their findings and conclusions to the class.

    Instructor Tip: The management question will most likely revolve around maintaining, modifying, or eliminating the policy. Research questions would then be expressed as statements of opinion (favoring or rejecting) of the policy and some ramifications of favoring or rejecting the policy. Students can be put into small groups and asked to review their ideas with peers. Once this is done, the small groups can be asked to reach consensus on the three issues and present their findings to the class.

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CHAPTER EXHIBITS

Exhibit Number	Exhibit title
2-1	Actions that Deliver Effective Research
2-2	The Research Process, with Ethical Responsibilities
2-3	CPM Schedule of Research Design
2-4	Gantt Chart of A Research Project

Notes an exhibit in the Research Process Series

CHAPTER LECTURE NOTES

WHAT IS GOOD RESEARCH

- Business research has inherent value only to the extent that it helps a manager make a better decision to achieve organizational goals than a decision made with the information he already has.
- Six factors provide quality standards for effective research (Exhibit 2-1)

• Purpose clearly defined	• Research design thoroughly planned and executed	• High ethical standards applied
• Adequate analysis for decision maker's needs	• Limitations frankly revealed	• Findings reported unambiguously; insights and conclusions justified

THE RESEARCH PROCESS

- Research steps are often begun out of sequence, some are carried out simultaneously, and some may be omitted.
- Despite these variations, a sequence is useful for developing a project and for keeping the project orderly as it unfolds.
  - ♦ Exhibit 2-2 models the **research process** and the ethical issues involved.
- Regardless of the type of research, a thorough understanding of the original question is fundamental to success.

STAGE 1: CLARIFY THE RESEARCH QUESTION

- The purpose of this stage is to determine whether research should be conducted.
- The manger must answer the following questions
  - ♦ What is/are the management dilemma(s) and which should be the focus?
  - ♦ What do we know that might help define and solve the dilemma?
  - ♦ What information do we need to make a decision?

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- Would knowing this information improve the decision(s) we must make to resolve the dilemma?
- Where will the funding come from for any proposed research?

Identify and Prioritize Dilemmas

- The process begins with the **management dilemma**—the problem or opportunity that requires a business decision.
- The management dilemma is usually a symptom of an actual problem, such as:
  - Rising costs.
  - Increasing tenant move-outs from an apartment complex.
  - Declining sales.
  - A larger number of product defects during the manufacture of an automobile.
  - An increasing number of letters and phone complaints about postpurchase service.

Snapshot: New Moms and Moms-to-Be Offer Video Insights

- The management dilemma can also be triggered by an early signal of an opportunity or growing evidence that a fad may be gaining staying power.
  - The discovery of an expensive chemical compound that would increase the efficacy of a drug.
  - The rise in penetration of smart phone usage
  - The shift in job hunting to digital job boards
  - Increasing numbers of firms minding data to develop digital dashboards.
- Firms that track **key performance indicators (KPIs)** are in a better position to identify management dilemmas.
  - Sophisticated businesses, track these KPIs using digital **dashboards**, compilation of tables and graphs of each metric, often showing current against prior performance and industry standards.
- Identifying opportunities often involves monitoring obscure developments in a variety of industries, as well as emerging trends in a firm's own industry.
- Curiosity is a valuable skill to develop for any researcher.

Exploration

- Exploration is used to identify and understand dilemmas and opportunities, as well as ask the right questions to understand decision options.
  - Historical information is increasingly used, as more is digitized.
- Exploration is highly unstructured research.
- Exploration involves defining plausible actions (options) to address dilemmas that are feasible given the company's resources.
- To move forward, a manager needs to frame a **research question**—the hypothesis that best states the objective of the research.

Should Research be Conducted?

- For the manager, capturing unknown information has a cost.
- The manager must estimate whether acquiring that information is worthwhile.

STAGE 2: DESIGN THE RESEARCH PROJECT

- The **research design** is the blueprint for collecting data that fulfills objectives and answers questions.

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- This stage of planning answers two questions:
  - Data Collection Design: What data needs to be collected, how and in what format?
  - Sampling Design: From whom or what does the data need to be collected and from how many?

Data

- **Data** are collective units of information from a subject or case measured by a data collector following consistent procedures.
- Data is classified as Primary or Secondary.
  - **Primary** data are recorded directly; they are raw and unprocessed.
  - **Secondary** data contain at least one level of interpretation.
- Data also reflect different property types that determine what can be done statistically with the data.
  - **Nominal** data provide classification, but no order, equal distance or natural origin.
  - **Ordinal** data provide classification and order but no equal distance or natural origin.
  - **Interval** data reveals classification, order, equal distance, but no natural origin.
  - **Ratio** data offers classification, order, equal distance, and natural origin.
- Unnumbered embedded table with characteristics/examples of different data types.

Snapshot: Research and Programmatic Algorithms

- Data can also be characterized by their abstractness, verifiability, elusiveness and truthfulness (closeness to the actual phenomenon measured).

Data Collection Design

- Data collection design is complicated by the availability of a large variety of methods, techniques, procedures and protocols.
- PicProfile: Emerging Research Techniques from 2016

Sampling Design

- The steps in sampling design include:
  - Define the target population
  - Define a case.
  - Define the number of cases needed.
  - Define the procedure for how each case will be recruited or selected.
- The **target population** is those people, events, or records that possess the desired information to answer the research question.
- Each unit within the target population is a **case**. Each case possess the information on one or more variables that need to be measured.
- In choosing the number of cases, the researcher first chooses between a **census** (measuring every case with a target population or a **sample** (a portion of the target population).
- Sampling protocols describe the way a sample is chosen from a target population, and whether and how a researcher might use incentives to engage a desired participant.

STAGE 3: COLLECT, PREPARE, & EXAMINE THE DATA

- This stage involves two sub-processes: actual collection of data and preparation of data for analysis.

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Collect the data

- Experiments, observation studies, online surveys, focus groups, photo ethnographic studies, even research gaming, are just a few of the methods used today.
- Increasingly, researchers combine more than one method to answer the research question (s).
- Questionnaires, standardized tests, and observational forms (called checklists) are among the devices used to record raw data.

Prepare the Data

- Most data must be edited prior to analysis to ensure consistency across respondents, objects, or events and to locate and address errors and omissions. .
- Data preparation processes address recording errors, improve legibility, and clarify unclear or unexpected responses.
- Processes for data preparation include more than code assignment to variables.
- A researcher may include summarization of data to located out-of-range answers and missing data.
  - Data are edited to ensure consistency across cases and to locate omissions.

STAGE 4: ANALYZE AND INTERPRETTHE DATA

- Managers need information and insights, not raw data, to make appropriate business decisions.
  - Researchers generate information and insights by analyzing data after its collection.
  - **Data analysis** is the editing, reducing, summarizing, looking for patterns, and applying statistical techniques to data.
  - During data analysis, researchers whittle down reams of statistical information to discover **findings** (key patterns in the data).
  - **Insights** result when a researcher interprets the findings in light of the manager's research questions.
  - Increasingly, managers are asking research specialists to make **recommendations** (data supported actions the manager should take) based on their interpretation of the data.

STAGE 5: REPORT THE RESULTS.

- In this stage of the process, the researcher reports and transmits the findings, insights, and any recommendations to the manager.
  - The researcher adjusts the style and organization of the report according to the target audience, the occasion, and the purpose of the research.
    - The report should be manager-friendly and avoid technical jargon.
    - Reports should be developed from the manager's or information user's perspective.
  - The researcher must accurately assess the manager's needs throughout the research process and incorporate this understanding into the final product, the research report.
  - To avoid having the research report shelved with no action taken, the researcher should strive for:
    - Insightful adaptation of the information to the client's needs.
    - Careful choice of words in crafting interpretations, conclusions, and recommendations.

THE RESEARCH PROJECT TIMEFRAME

- At its core, research is a time based project and project management tools can be used to depict sequential and simultaneous steps and estimate scheduling and timetables for each activity or phase of the research.

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- Both CPM and Gantt charts are used to schedule project tasks.
    - Exhibit 2-3 CPM Schedule of Research Design
    - Exhibit 2-4 Gantt Chart of a Research Project

RESEARCH PROCESS PITFALLS AND SOLUTIONS

- Studies can wander off target or be less effective than they should be for a multitude of reasons.

Ill-Defined Research Questions

- Some problems are so complex, value-laden, and bound by constraints that they are intractable to traditional forms of analysis.
    - Ill-defined research questions may have too many interrelate facets to be measured accurately.
    - Methods may not presently exist to handle questions of this type.
    - Even if such methods were invented, they might not produce the data necessary to solve such problems.
- Spending sufficient time on exploration and problem definition may address this issue, but some ill-defined research questions are really unresearchable ones.

Unresearchable Questions

- To be researchable, a question must 1) be one for which data collection and analysis can provide the answer, 2) be answerable with current data collection techniques, and 3) some units within target population has to be accessible and to be willing to share the data.
- There is little a researcher can do if a question can't be addressed with data. However, if he overcomes this first issue, then the researcher would need to develop new research designs and data collection procedures to address the last two issues.

Over-embracing Data Analytics

- The existence of big data can seduce a manager, seemingly eliminating the need for dilemma-specific research..
    - Each field in a data file was created for a specific reason, which may or may not be compatible with the management question facing the organization.
    - Having a massive amount of information is not the same as having knowledge.
- Researchers can avoid this problem by pointing out the lack of compatibility to the current dilemma of the source, time frame, and operational definitions of data variables on which the manager (or his or her superior) wants to rely.

Manager's Hidden Agenda(s)

- A manager's motivation for seeking research may not always be obvious.
- Researchers facing hidden agendas often experience pressure to pursue research questions or specific research designs which, with analysis, seem inappropriate.
- Hidden agendas may include:
    - Managers are often rewarded (higher pay, better office location, more status or prestige) for building empires of authority.
    - Sometimes, research may be authorized even though a decision has been made; Authorizing research is a measure of personal protection for decision maker.

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- ♦ Research may be focused ona less attractive action option, as an attempt to win approval for a manager's pet idea.

- Researchers avoid hidden agendas by asking the manager lots of questions to clarify—and agree on—the research question.

The Favored-Technique Syndrome

- Not all researchers are comfortable with every plausible methodology; they are method-bound.
- These researchers recast any research question so that it is amenable to their favored methology.
- To avoid this pitfall, managers must demand that a researcher justify their selection of research design and their rejection of alternative designs.

Researcher Inexperience

- Inexperience can cause several pitfall: relying too heavily on exploratory data to define the research question or interpret data; substituting personal experience for insufficient data to form insights, thereby misdirecting conclusion; projecting the responses of a limited sample to a target population, etc.
- Dealing with this pitfall involves selecting experienced researchers, having more experienced researchers supervise less experienced ones, and having managers hire research expertise rather than doing their own when they are inexperienced.

RESEARCH PROCESS ETHICAL ISSUES AND RESPONSIBILITIES

- Exhibit 2-2, The Research Process with Ethical Issues summaries ethical responsibilities.
- Ethical issues relate to deception, privacy quality, notice, choice, access, security, respect and bias.
- Participant-related issues focus on truthfulness and completion of research tasks which influences a right to quality research.
- Manager-related issues include record accuracy (Researcher's right to quality research), purpose transparency and truthfulness (Researcher's right to absence of sponsor deception), not asking for research results to be falsified (Researcher's right to absence of sponsor coercion), and fulfilling contractual obligations (Researcher's right to adequate compensation for results).
- Researcher-related issues include for the participant: participant's right of informed consent, accepting a participant's right to privacy, participant's right to safety, keeping participant right to confidentiality.
- For the manager, these responsibilities include: protecting protecting the sponsor's right of purpose non-disclosure and sponsor's right of sponsorship nondisclosure), following acceptable industry practices and procedures (Sponsor's right to quality research); and protecting data, findings, insights, and recommendations (Sponsor's right to findings non-disclosure).

Snapshot Is your Research Project Leaving the Country?

ANSWERS TO DISCUSSION QUESTIONS

Terms in Review

1. Distinguish between the following and identify the research use of each.
a primary and secondary data
b finding and insight
c census and sample
d management dilemma and research question

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a Primary data is raw data; secondary data has at least one level of interpretation (processed); research collects both primary and secondary data.
b Finding is a key pattern discovered by summarizing, reducing, or cross-tabulating data variables, while insights are interpretations of findings, in light of the research question; research uses both, as you can have an insight without one or more findings.
c Census is the total target population; a sample is a portion of a target population; business usually uses a sample, but will use a census when the target population is small or easily accessible.
d Management dilemma is a symptom of a problem, while a research question is the focus of research, usually in the form of a hypothesis; you don't have a research question without first identifying a management dilemma.

Making Research Decisions

2. **Kathy Lee Berggren, a professor of oral communication at Cornell University, indicates "a lot of my students really [only] scratch the surface with the type of researchthey're doing." According to Andy Guess, at Inside Higher Ed, "Just because students walk in the door as 'digital natives', doesn't mean they're equipped to handle the heavy lifting of digital databases and proprietary search engines that comprise the bulk of modern, online research techniques." Students erroneously think a Google search is research." As you evaluate the factors that guarantee good research, what actions do you propose to narrow the gap between students' research competence and what's required of a modern college graduate about to become a manager with research responsibilities?**

Student answers will vary widely here, but it will get them thinking about what they can do to be better researchers. This will make a good brainstorming question. Keep them focused on the list of factors such as developing a better list of key words for searching, the number and types of databases searched, etc.

3. **SupplyCo is a supplier to a number of firms in an industry. Several companies are involved in the manufacturing process—from processed parts to creation of the final product—with each firm adding some value to the product. SupplyCo provides materials and services to every part of the chain. By carefully study its customer data, SupplyCo discovers a plausible new model for manufacturing and distributing industry products that would increase the overall efficiency of the industry, reduce costs of production, and result in greater sales and profits for some of the industry's participants (SupplyCo's customers). Implementing the model might hurt the sales and profits of some SupplyCo customers that did not have the manpower, plant or equipment, or financial resources to participate in the change. These companies might potentially go out of business, decreasing SupplyCo's sales and profits in the short term. SupplyCo is considering research to further study the new model. SupplyCo. had the data within its warehouse only because of its relationship with its customers.**
a Is it a betrayal to use the data in a manner that would cause some customers harm? Or does SupplyCo have a more powerful obligation to its stockholders and employees to aggressively research the new model?
b What are the implications of your answers even if there is no violation of law, industry regulation, or company policy?

A) One issue in this particular case is the nature of data used from SupplyCo's data warehouse. The data can be an outcome of:

(1) careful research,

(2) information that is inevitably available to a supplier as an outcome of transactions, and may therefore not be considered privileged, or

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(3) data that has been made available on the presumption or condition that it will not be used adversely.

The case analysis could examine the legal aspects of the situation versus ethical infringements on data confidentiality and the misuse of data. Consequences relate to SupplyCo's actions on the "victims" of the decision. Other consequences are the public's perception of the aggressive organization (SupplyCo) and the perception of its associates, suppliers, buyers and employees. Changes in relationships, perceptions of commitment, and trust are key issues here.

Consider dividing the class into groups and have them each take a role in answering the question (stockholder of SupplyCo, stockholder of any supplier, employees of SupplyCo, Director of Ethics for SupplyCo, etc.). Have each group argue the decision from their assigned perspective.

B. While the above subtleties are not elaborated in the case, different contexts to the nature of the information can change approaches to the problem. The second issue pertains to an understanding of the capitalist ethic. Principles of competition have been expressed as paradigms of "opportunistic behavior," in theoretical developments in economics, such as transaction cost analysis. This paradigm of competing opportunistically was earlier considered well justified with an acceptance of the capitalist system. However, more recently, there has been a focus on relational systems of "cooperation," which have a longer time horizon, and reduce the possibility of opportunistic behavior between potential partners, yet create long term competitive competencies. In this case, to compete it is necessary to enter the acrimonious decision making area where "some are made better off, only at the cost of others," to explore areas of cooperation, which in fact may provide other advantages later. The debate between principles of cooperation versus competition has been exemplified in debates between Japanese and western management styles. This case gives a research case twist to this debate.

4. Based on an analysis of the last six months' sales, your boss notices that sales of beef products are declining in your chain's restaurants. As beef entrée sales decline, so do profits. Fearing beef sales have declined due to several newspaper stories reporting E.coli contamination discovered at area grocery stores, he suggests a survey of area restaurants to see if the situation is pervasive.

(a) What do you think of this research suggestion?

(b) How, if at all, could you improve on your boss's formulation of the research question?

A) Students should be asked for suggestions as to why sales of beef entrees might be declining. They should generate many plausible reasons. Sales of beef could be down due to fear (as suggested), but might also have decreased due to a shift to fish, chicken, or vegetarian foods. Any of these alternative entrees would be appropriate choices if customers are experiencing increasing concern over high cholesterol, as promoted by the area's medical community. Declining sales might also be due to the closing of a primary beef supplier, causing beef deliveries to be interrupted, with a resulting out-of-stock condition occurring. Sales could also be down due to waitress suggestions, price incentives on desserts which led customers to reduce the size of their entrees, or a new chef who prefers to use non-beef products for the featured entrée. We need to know more about the internal situation to move forward. When did the sales decline begin? Can the sales declines be linked to changes in other internal behaviors? A survey of area restaurants, if the stimulus is external, might support the idea of diminished sales of beef, but wouldn't provide a reason for they sales drop-off or suggest how to correct the situation. Why, for example, is a survey of other restaurants better than a survey of the restaurant's customers? The manager might be jumping to an unwarranted conclusion that would result in misspent research dollars.

B) Encourage the students to use the management-research question hierarchy as starting point. Once they do, it should be obvious that while we might want a survey of area restaurants' beef entrees, it is less likely that we will be looking for external influences and more likely that the manager should be examining what proactive actions could be taken in his own restaurant. The manager has defined his research question as: "What external conditions are influencing beef entrée sales?" While this is a plausible investigative question to his study, it is unlikely to help reverse the trend of beef entrée sales.

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One of your students should generate the following:

- Management dilemma: Beef entrée sales are declining.
- Management question: What could we do to increase beef entrée sales? or What could we do to return beef entrée sales to their pre-decline level?
    - Inherent in the management question is the need to explore why beef entrée sales have declined. Both internal and external causes should be studied. But plausible ideas for how declining beef entrée sales could be reversed should be the focus of the exploratory research. External causes might relate to changes in diet; media stories about adverse effects of too much beef, or any beef, or mad-cow disease in a foreign country; a Surgeon General's report on the negative effects of high-fat diets, poor training of retail sales staff or a strike at a major supplier, etc. Internal factors could relate to inadequacy of training of food preparation workers, outdated inventory management that leads to supply-chain problems, an eccentric chef who decides to put more emphasis on other protein sources, no money for promotion, etc. For our purposes, we'll narrow down the options to reasons that involve the beef entrees themselves (as opposed to distribution, pricing, promotion, etc.).
- Research question: Some plausible ones might be: Should smaller beef entrée portions be offered? Should more highly-seasoned beef entrées be added to the menu? Should a lower-fat beef supplier be found? Should a beef entrée be a featured special at least three days a week? And so on.

5. You have received a business research report done by a consultant for your firm, a life insurance company. The study is a survey of customer satisfaction based on a sample of 600. You are asked to comment on its quality. What will you look for?

I would ensure that the purpose of the research had been clearly defined; that the research process had been thoroughly documented and planned; that limitations had been revealed; that highly ethical standards were applied; that there was adequate analysis; that the findings were straightforward (unambiguous); that the conclusions were justified, and that the researcher's credentials were stated. Further, I might evaluate the demographics of the 600. Were they all in the same age range? From the same region of the country? Buyers of similar insurance products?

6. As area sales manager for a company manufacturing and marketing outboard engines, you have been assigned the responsibility of conducting a research study to estimate the sales potential of your products in the domestic (U.S. or Canadian) market. Discuss key issues and concerns arising from the fact that you, the manager, are also the researcher.

This is a touchy situation. As a representative of the company, I would like to present fair and unbiased facts. However, it would be tempting to slant the information. For instance, a common source of bias is to understate demand. This makes sales goals easier to achieve, which makes the sales department look good. Understating demand, however, may mean that production gears down, which can negatively impact availability and customer satisfaction, and hence the ability to make sales. And if sales projections are too low, it may mean layoffs or territory consolidations.
On the plus side, it would help me pinpoint key products, salespeople, territories, and customers. All of which could help me refine the sales force, it's methods, and training needs.

From Concept to Practice

7. Using Exhibit 2-2 and case examples from marketing firms' websites, discover how "favored technique" approaches to research design dominate many firm's strategies.

As indicated in the Chapter, it is the role of the manager sponsoring the research to spot inappropriate-technique-driven research proposals. Students should review Exhibit 2-2 and the section of the Chapter "Research Process Pitfalls and their Solutions" (e.g., The Favored-Technique Syndrome) before attempting this question. Students are free to explore research firms' websites for further

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information on "favored technique" approaches to research design. The most appropriate examples should be presented to the entire class for discussion.

8. Using Exhibit 2-2, find a case study of a research example in which a clear statement of the management dilemma leads to a precise and actionable research question. (Hint: Visit research companies websites or use a search engine to find examples.)

After reviewing Exhibit 2-2, students are encouraged to review examples in the text and on various research organization websites to determine management dilemmas. Another approach is to review current periodicals such as *Business Week, Fortune, Business 2.0,* etc. for contemporary stories that reveal a management dilemma. Report on findings to the class following the guidelines in the question.

From the Headlines

9. Hearsay Social is a company developed to monitor how workers at large companies interact with customers on Facebook, LinkedIn and other social media sites. Companies pay $100,000 or more for a digital dashboard that alerts supervisory managers if employees are violating privacy policies, regulatory compliance rules, or other company policies. If you were a large client, like Farmers Insurance, what would you want built into the dashboard.

This is a good question for brainstorming about information that is not appropriate for researchers to collect. Even students without insurance experience should be savvy enough to know that personal information like Social Security or other official identification numbers, and credit card or bank accounts should never be collected by employees on a social media site. But of even more value is a discussion about what information employees should not share with professional colleagues at other companies. Students might be quick to mention financial performance measures and patents, but might be less likely to mention new training initiatives, corporate operations moves like new locations, new ad campaigns about to launch, seminars where executives will be speaking, etc. A second aspect of this exercise should be about how such a dashboard might be used to help make better decisions. It could identify employees who are leveraging his or her social media interactions to garner new customers or more business from existing customers, or early identification of employee disenchantment or customer dissatisfaction. Finally, students should be guided to discuss the ethics of monitoring employee social media behavior.

10. Researchers recently reported in *Cell Metabolism* that a natural ingredient found in milk can protect mice against obesity even while they enjoyed diets that were high in fat. Mice given high doses of nicotinamide riboside along with their high-fat meals burned more fat. Their muscles worked better, providing them better endurance and making them better runners. If you worked for the National Milk Producers Federation, could you justify a research proposal to determine the value of a national ad campaign to promote the qualities of milk in a balanced diet and for avoiding obesity based on this information found during exploration? If not, develop an argument to justify a research study.

A proposal for a national ad campaign based on one study (especially one generalizing from mice trials) might stretch the credibility of the organization. The findings of this study could be integrated into a larger body of scientific evidence for use in NMPF's proposal. By connecting to current studies between dairy consumption and healthy weight, including among children and adolescents, NMPF could develop a compelling strategy for the proposal. NMPF's proposal would then include the components of trust (informed scientific views and information), innovation (bringing new ideas and a fresh approach), and vision (pre-empting issues and matters of interest that are not grounded in scientific research).

Since obesity among children is currently an important issue, recent research in a *Current Nutrition & Food Science* article that reviewed 36 observational studies on the relationship between dairy food

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consumption or calcium intake on body weight and body composition in children and adolescents could serve as the basis for the proposal. The results from the majority of the studies indicate that milk intake has a beneficial or neutral effect on body weight and body composition in children and adolescents. "Milk Ingredient Does a Waistline Good," *ScienceDaily*, June 5, 2012, downloaded June 6, 2012 (http://www.sciencedaily.com/releases/2012/06/120605130748.htm).

Some questions are answerable by research, and others are not. Using some management problems of your choosing, distinguish between them.

Student answers will vary. Sample answer:
When we consider whether a topic is researchable it is wise to note that the answer is one of degree. Research can shed some light on most topics, but there are two situations where research can not provide much help. In the first case there are questions relating to "value" where fact gathering can not contribute much. For example, we may consider making a merger offer to company X and ask the question, "Do we really want to grow in this way?" Or, "Will we be happier making this offer rather than an offer to company Y?"

A second situation where research is limited concerns those questions where data gathering could be helpful, but our techniques or procedures are inadequate. In the merger case, for example, we might ask the question, "Will the stockholders of Company X welcome our merger offer?" This type of question is answered if there is a way to get the data before making the offer. However, there may be no method to enable us to make this assessment short of making the offer. Or again, the question, "Will the U.S. Department of Justice fight our merger plan?" While there are no legitimate techniques to gain certainty about such information, research may provide probable or at least possible clues as to reactions from stockholders, government agencies and other stakeholders.

2. Discuss the problems of trading off exploration and pilot testing under tight budgetary constraints. What are the immediate and long-term effects?

This question addresses the issue of shortsightedness in research planning. The use of exploration, even under budgetary restraints, may make the difference between terminating the project early or spending a substantial sum to rediscover what is already known. The use of published data and experience surveys, for example, may permit answering the question, changing the question, refining the question, or selecting an optimal methodology—all of which are cost saving. Whereas exploration avoids costly mistakes on the front end of the problem, pilot testing identifies methodological misapplications and measurement problems before data collection. Both activities add to the cost of the project, but without them the information may be completely without value. The failure to do some exploration may result in studying the wrong problem and the failure to pretest may threaten the validity of the study.

3. A company is experiencing a poor inventory management situation and receives alternative research proposals. Proposal 1 is to use an audit of last year's transactions as a basis for recommendations. Proposal 2 is to study and recommend changes to the procedures and system used by the materials department. Discuss issues of evaluation in terms of:
(a) Ex post facto versus prior evaluation.
(b) Evaluation using option analysis and decision theory.

In a study of an inventory management situation the use of the last year's audit as the key database would imply that previous data on inventory levels, inventory mistakes, slow moving and surplus stock is the basis for decision making. Normally such data is used to evaluate the appropriateness of desired inventory levels (minimum, maximum, average). Simulations are also possible based on alternative models. The second proposal uses a study of systems and procedures to recommend changes. The focus here is procedural efficiency and the results of new procedures are normally more conjectural than quantitative data based approaches.

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Prior evaluation is generally difficult; however a data-driven, audit based approach can predict or simulate cost changes for carrying inventories. This is based on the evaluation of past inventory levels, and targeted inventory levels using revised inventory carrying norms. The same exercise becomes more difficult for a systems- and procedure-based approach, because it is far more difficult to impute quantitative cost saving to procedural changes. While 'ex post facto' evaluations are easier in either case, with the latter problem, this may be the only form of evaluation possible.

The two research options are decision option alternatives and saving's expectations computed ex ante. One interesting point is that there is a possibility that the two proposals finally yield similar expectations of savings. However, one of the options may involve a more risky proposition: a more risky proposition anticipates a greater deviation between the best and worst case scenarios, even though the savings expectation could be the same. Here decisions would have to go beyond a decision theory of expectations and the final decision would depend on a choice between risk averse and risk seeking behavior.

Making Research Decisions

4. It costs thousands of dollars to generate an application (apps) for the Apple iPad. Just offering an APP is not a guarantee of success. The most successful APPS, sold as downloads, have to offer true functional value. Apple takes weeks to review an app proposal; only with Apple's approval can an APP be officially offered for the iPhone or iPad. If you were Apple, what research would you want to see within the proposal to approve a new app for the iPhone or iPad?

Apple has a vested interested in having as many useful applications for its iPhone or iPad as possible; the more applications, the more valuable its phone is in comparison to its competitors. We suggest using Exhibit 4-1: The Research Process to discuss this question. This question is particularly appropriate for discussing the first stage in the process, clarifying the research question. As the Apple manager in charge of APPs is reviewing essentially proposals for APPs, his management question is "Will this particular APP create added value for the iPhone or iPad?" One research question might be whether Apple would want to see statistics (e.g., % of users who currently want a particular functionality on their iPhone or iPad as drawn from a survey) or whether Apple would accept articles based on blogs, Twitter posts, etc. to support a proposal for an APP.

It would also be appropriate to discuss that not all managerial decisions actually need detailed research projects and whether the manager in charge of Apple's APPs program is willing to let partner companies develop APPs at their own cost and let the market decide which is valuable based on download demand. (Note: Many APPs are free downloads, although companies that develop them are trying to find a revenue model that works.)

A caution: Discourage students from straying into a brainstorming session on the value of particular APPs or ideas for new APPs. Keep their focus on what research Apple would like to see to prove a proposed APP would add value to the iPhone or iPad.

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ADDITIONAL DISCUSSION OPPORTUNITIES

Video or Written Case Discussion

You will find a description of each case in the Case Abstracts section of the textbook. Cases and case supplement, including discussion guides, are available in Connect or downloadable from www.mhhe.com/schindler13e. Cases appropriate for discussion of concepts in this chapter include the following.

- Akron Children's Hospital
- Calling Up Attendance
- Covering Kids with Health Care
- Donatos: Finding the New Pizza
- Goodyear's Aquatred
- HeroBuilders.com
- Inquiring Minds Want to Know—Now
- Lexus SC 430
- Mastering Teacher Leadership
- NCRCC: Teeing Up a New Strategic Direction
- Ohio Lottery: Innovative Research Design Drives Winning
- Ramada Demonstrates Its Personal Best™
- State Farm: Dangerous Intersections
- USTA: Come Out Swinging

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Discussion Using Prior Snapshots, PicProfiles, Pull Quotes, or Exhibits

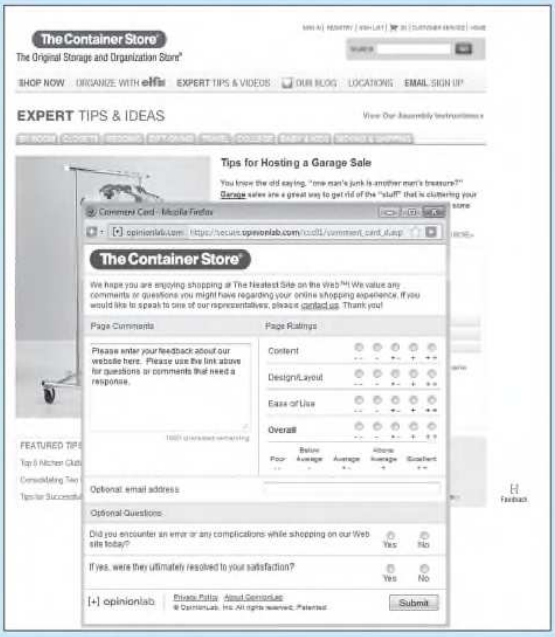
Referenced URLs may have changed as some companies have merged and/or are renamed.

The Container Store teams with OpinionLab to gain feedback

The Container Store is a favorite among highly organized people and those wishing to be. In addition to its stores, its website offers a wealth of ideas as well as access to manufacturer- and private-brand inventory. A customer can enter data that permits The Container Store personnel to recommend an elfa® closet design or watch videos to enable them to do storage projects themselves. Lucy Witte, the company's vice president of direct marketing & media, is charged with creating the best website experience for customers. When the website is updated, she wants to identify potential technical problems that might not be caught during pre-testing.

The Container Store partnered with OpinionLab to use its feedback platform to involve customers in making the website as powerful as it needs to be. OpinionLab provides feedback from any PC or mobile device so a research respondent can share direct input on a product or website feature. Each page on the website features a [+] feedback link—a revolving +/− sign—in the lower right corner. When a customer clicks on the link, a comment window appears. "OpinionLab allows us to identify and resolve issues as they emerge and this is a tremendous tool for improving our customers' experience across channels, which is increasingly important as our customers turn to tablets, mobile, stores and desktops to shop," shared Witte. OpinionLab's platform makes it much easier for customers to interact with the company in real time, the new standard for 21st century research.

The Container Store received more than it initially intended with its OpinionLab feedback process. Besides learning, for example, that photos weren't clear, customers also asked questions about which products would best fit their needs and commented positively and negatively on their in-store



experiences. "We share these comments with our store managers and staff," explained Witte, indicating that the feedback has influenced in-store staff training.

According to Jonathan Levitt, chief marketing officer of OpinionLab, "By understanding shoppers' motivations and reasons for [online purchase] abandonment, The Container Store was able to quantify [and understand] multichannel purchase behaviors and optimize the experience for their best sellers."

www.containerstore.com; www.opinionlab.com

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Should Companies Hire Teens?

According to the U.S. Bureau of Labor Statistics, 32.6 percent of teens nationwide worked during the summer of 2008, another year of decreased participation in the labor force. With the economy in recession, it's no wonder that teen employment is down along with overall employment.

For the summer of 2008, according to the Bureau of Labor Statistics, teens had an unemployment rate of 23.6 percent, an increase of more than 9 percent from just two years ago and almost three times the unemployment rate for adults. Economists think that teen unemployment may be significantly understated by the number of teens who felt locked out of the job market and did not actively seek employment.

Let's assume you are a manager of an organization that is questioning whether it should hire teen workers. A study sponsored by The Conference Board, Partnership for 21st Century Skills, Society for Human Resource Management, and Corporate Voices for Working Families, "Are They Really Ready to Work?" reports the opinions of more than 400 U.S. executives and human resource professions. Their unfavorable opinion was that "far too many young people are inadequately prepared to be successful in the workplace." Assessing teens with a Workforce Readiness Report Card, "10 skills that a majority of employer respondents rate as 'very important' to workforce success are on the Deficiency List." The report further defines the problem of teen workplace skills: "At the high school level, well over one-half of new entrants are deficiently prepared in the most important skills—Oral and Written Communications, Professionalism/Work Ethic, and Critical Thinking/Problem Solving."

You remember how important work was in building self-confidence and independence, so you don't want to write off all teens, but you are also concerned that supporting a "hire teens" initiative might be counter-productive to your own job advancement if the study proves to be true. What research could you do to help formulate your recommendation on whether your organization should or should not hire teen workers?



www.bls.gov

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>picprofile

Kraft research won well-deserved recognition for research that helped diagnose and improve sales of sliced cheese by 11.8 percent with a 14.5 percent increase in base volume. Kraft started by sending ethnographers from Strategic Frameworking to interview moms aged 25 to 64 who were fixing sandwiches in their kitchens. Focus groups then reinforced that moms feel good about giving their kids cheese because of its nutritional value, but that moms would choose a lower-priced cheese, even though their kids preferred Kraft. A subsequent phone survey by Market Facts revealed that moms would buy the pricier Kraft slices due to its extra calcium. Two TV commercials were tested using the "good-taste-plus-the-calcium-they-need" message. The tests revealed that the commercial showing kids scarfing down the gooey sandwiches where the Dairy Fairy delivered the calcium message outperformed a more serious commercial with the same message. Subsequent copy-testing research by Millward Brown Group revealed that the dual message (taste-preferred/calcium) was heard.
www.kraft.com; www.strategicframeworking.com; www.marketfacts.com; www.millwardbrown.com

Bissell: Small Budget Generates Powerful Direction

When CEO Mark Bissell returned from a European business trip with a prototype appliance, a steam cleaner named Steam Gun, he challenged the marketing research director to determine the marketing for the new product within a one-month time frame. With a full-scale research project out of the question, the research director chose a small-scale ethnography study using real-world observations of people's interactions with the product. He approached a local Parent Teacher Association, a ready source of female respondents, which distributed the Steam Gun to 20 volunteers. He followed up the test with in-home visits. Within 30 days, the research director knew the name must be changed and that those in the "serious cleaner" target segment would need to be convinced that steam cleaning with chemical-free water would be effective. He delivered a marketing program in the requisite time for the newly named Bissell Steam 'n Clean. The primary budget item in the research was a $1,500 donation



to the PTA, proving that research budgets for successful decision making come in all sizes.

www.bissell.com

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A Love-Match between Lexus and Research

If your product earns rave reviews for dependability/reliability, quality workmanship, and manufacturer reputation, that's good, right? If your firm delivers on the promise of your long-held promotional tagline—the "Pursuit of Perfection"—that's great, right? "Not good enough," claims Mark Miller, associate director of strategic planning, Team One Advertising, "when Toyota is determined to infuse the Lexus brand with passion."

Toyota faced some troubling statistics in the 1997–1999 model years. While the Lexus brand was setting sales records and overall the luxury coupe category was growing, its Lexus coupe sales were declining. And while Lexus scored well on the rational motivators, it lacked the emotional motivators deemed critical for luxury coupe success, especially against Corvette, Porsche, and Mercedes. Toyota engineers had developed a concept car in Japan, the SC 430. This car was Toyota's first luxury convertible and sported a technologically advanced, retractable hard top rather than the more usual soft "rag" top.

Team One was charged with developing the communications program to launch the SC 430. Understanding that this car was and needed to be a departure from traditional Lexus brand imagery, Team One needed information to accomplish Toyota's more aggressive agenda: "(1) evolve the Lexus brand using the SC 430 convertible as the emotional flagship, (2) stimulate desire for the Lexus brand, as well as desire for the SC 430 convertible, (3) make a connection with luxury convertible buyers beyond the rational, and (4) inject more passion into our Pursuit of Perfection." Using syndicated tracking studies by Allison-Fisher and innovative quantitative research by Diagnostic Research Inc., along with strategic marketing clinic research by the Lexus team, and data mining Toyota's Consolidated Dynamic Study, Team One created its innovative French-language American-aired campaign. The *Cabriolet Nouveau* campaign married the association of the French with seduction, love, and romance to the "stylish, sophisticated, sexy" Lexus SC 430. The results were award-winning in numerous ways, including earning the 2002 David Ogilvy Research Award in the durables category.

Using the management-research question hierarchy, identify the management dilemma, management question(s), and research question(s) that would drive this research. Watch for the special icon that indicates a continuation of this research story example.

www.lexus.com; www.teamoneadv.com; www.diagnostic.com; www.allison-fisher.com



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Covering Kids with Health Care



The Robert Wood Johnson Foundation (RWJF), established as a national philanthropy in 1972 and today the world's largest health foundation, is on a mission to improve the state of health care among American families. Many families cannot afford the co-payment of employer-sponsored health premiums or work for employers who cannot offer health benefits. RWJF makes grants to achieve three goals: (1) to ensure that all Americans have access to affordable health care, (2) to improve health care delivery services to people with chronic conditions, and (3) to promote health by reducing the harm caused by substance abuse from tobacco, alcohol, and illicit drugs. In 1997, RWJF developed its Covering Kids initiative. Its purpose was to generate state- and community-based programs that would design and simplify outreach programs to identify and enroll uninsured children from low-income families in the State Children's Health Insurance Program (SCHIP). SCHIP, a $24 billion program included in the federal Balanced Budget Act of 1997, provides payment for prescriptions and doctor visits. "We were going to expend significant resources, more than $47 million on an integrated communication campaign to reach a group of people that marketers spent very little time and effort serving. We wanted to be sure that what we were going to do was effective and would succeed in enrolling the children of working families in SCHIP," shared communications officer Stuart Schear, the project's director. RWJF spent two years developing a coalition of government agencies and children's advocates to simplify enrollment forms and processes. People in the field feared that participation in government health care programs carried the negative stigma of welfare. Research was needed to determine why parents might or might not enroll their children. RWJF sought a collaborative partner that would use RWJF's extensive knowledge and understanding of working, low-income families at every stage of research design. The resulting research and its use to create advertising that enrolled kids in SCHIP earned RWJF, Wirthlin Worldwide (a strategic consulting and research provider with expertise in public issues), and GMMB (a strategic consulting firm specializing in public education and political campaigns) the 2002 David Ogilvy Research Award. This award is given for research contributing to highly successful advertising. In Snapshots throughout this text, we'll reveal the research and its results; watch for the Covering Kids icon.

www.rwjf.org, www.wirthlin.com, www.gmmb.com

WASSUP? from Donatos Pizza

In the food business, usually strategic windows remain open for limited periods of time. "Restaurants are influenced by many factors. Some include product, message, weather, reputation, and competition," shared Donatos' chief concept officer, Tom Krouse. In Donatos *WASSUP?* meetings, each employee brings knowledge of an element from popular culture and the group discusses its possible effect on the company's 184 restaurants. Exposure comes from articles, movies, books, TV, and daily living. Donatos filters this less formal exploration with syndicated research. "By late July, we had research that showed 26 percent of adult eaters were carb-aware." And Donatos had evidence that adults were incorporating low-carb habits into their diets. In its own restaurants, diners were eating the toppings from their favorite meat-loaded pizza but leaving the crust behind. On this accumulated evidence, Donatos decided it wanted to own the low-carb position in pizza.

Donatos first step was to compact its normal new product development process into less than six months—to be ready for the traditional postholiday increase in dieting. Taste tests told Donatos that the low-carb crust options available sacrificed taste—and choosing that route would have jeopardized its premium pizza flavor positioning, which was reinforced by its Edge-to-Edge™ toppings. Instead, Donatos chose a more expensive, but true-to-positioning, product that incorporated protein crisps and tested well with pizza eaters. Following the discovery of a high-heat-resistant paper that could serve as both baking and serving plate, the company did in-store trials in two restaurants. In-store postpurchase surveys of diners told Donatos its No Dough pizza was a winner. Donatos rolled out the No Dough pizza to its 184 restaurants in January 2004. The menu board now shows three crusts versions: original crispy, traditional, or No Dough. Diners simply choose their favorite pizza toppings and choose the No Dough option. Increased visits from Atkin's dieters and purchases from a hidden segment, gluten avoiders, propelled sales increases. Coverage in numerous local papers and TV segments, on the *Today* show, and in the *New York Times* helps Donatos own the low-carb position in pizza in its markets.

www.donatos.com

To learn more, read the case on your DVD: "Donatos: Finding the New Pizza."

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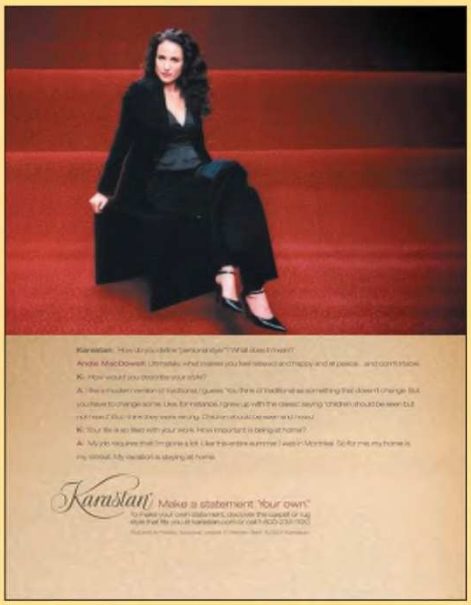
Austin Kelley Helps Karastan Make a Statement

While Karastan has long been a brand leader in floor coverings, research showed that it was not connecting with rising, young, affluent consumers. Karastan, perceived as too formal for their active lifestyles, was seen as their "parents' brand."

In developing the best positioning for the brand, Karastan conducted a series of in-home focus groups in order to gather insight into its target consumer. Focus groups were held in the homes of women who were current and potential Karastan consumers. Each focus group consisted of 10 women whose ages ranged from midthirties to late forties. The in-home setting was selected to ensure the comfort level of the participants and to match the tone of the brand. Depending on their age, the focus group participants represented two groups: Brand Loyals and Rising Affluents. Throughout each two-hour session, participants engaged in open discussion, viewed product samples, and reacted to brand positioning lines. Moderators directed the conversation with questions such as, "What motivates you to decorate?" and "How does the concept of the home manifest itself for you?" Both groups conveyed a passion for decorating and an emotional connection with the home. In choosing floor coverings, it was the styles and colors that had the greatest impact on women's decorating choices. This insight, that women viewed decorating as a means of self-expression, helped to develop the positioning tagline: "Make a Statement. Your Own."

Karastan was poised to select a celebrity spokesperson who appealed to the interests of the target market. Actress/model/mother Andie MacDowell was selected to launch the campaign.

The campaign, which is presented in a Q&A format similar to a celebrity profile, is Karastan's first to target a younger, more contemporary audience than its traditional consumer. The effort positions the company's high-end carpets and rugs as fashion



brands for "decorating divas"—women who use their homes to make a unique and personal statement. Although MacDowell was the launch, the campaign will expand over the next few years to feature a diverse group of celebrities who make similar style statements.

www.karastan.com; www.austinkelley.com; www.slingshotstrategy.com

Can you envision the internal proposal for this research project?

Additional Discussion Question

Confronted by low productivity, the president of Oaks International, Inc. asks a research company to study job satisfaction in the corporation. What are some of the important reasons that this research project may fail to make an adequate contribution to the solution of management problems?

The President of Oaks International Inc. faces a management dilemma: the company is plagued by low productivity. The management question should seek to identify the factors that lead to low productivity and identify the strategies that can lead to increases in productivity. In this case the President is assuming that (1) the cause of low productivity in the organization is job satisfaction (2) there is a relationship between job satisfaction and productivity. The latter relationship, even if partially valid, may be largely influenced by moderating and intervening variables. For instance, performance or productivity is an outcome of "work input" or effort, and this becomes a key intervening variable; a similar variable may be absenteeism. Focusing on these variables may be important, as their salience may be as high as that of job satisfaction. Finally, the cause of low productivity may not lie in personnel issues, but in other matters such as the plant, equipment, materials availability, or technology. The President's approach biases the results and an exploratory exercise to determine possible causes of low productivity is necessary. This may be followed up by a pilot study to narrow key research questions to factors that have greater importance with respect to productivity.

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Resources for Ethical Awareness

Journals and Magazines
Alert!; http://alert.marketingresearch.org/
Business Ethics; www.business-ethics.com/.
Business Ethics Quarterly; https://secure.pdcnet.org/pdc/bvdb.nsf/journal?openform&journal=pdc_beq.
Business and Professional Ethics Journal, DePaul University; http://commerce.depaul.edu/ethics/research-teaching/publications/business-professional-ethics-j.asp.
Business and Society; (IABS Journal); http://bas.sagepub.com/.
Business and Society Review; http://www.wiley.com/bw/journal.asp?ref=0045-3609.
Business and Society Review, Center for Business Ethics at Bentley College; http://www.bentley.edu/cbe/.
Electronic Journal of Business Ethics and Organizational Studies (EJBO); http://ejbo.jyu.fi/.
Ethics Newsline; www.globalethics.org/newsline/.
Ethikos; www.ethikos.com/.
Journal of Business Ethics; www.springerlink.com/content/100281/.
Journal of Business Ethics; http://www.ingentaconnect.com/content/klu/busi.
Marketing Research; http://www.marketingpower.com/AboutAMA/Pages/AMA Publications/AMA Magazines/Marketing Research/MarketingResearch.aspx.
Research, Training, and Conferences
Advanced Research Techniques Forum, American Marketing Association Chicago, IL (800 AMA-1150; www.marketingpower.com).
Applied Research Ethics National Association (ARENA) Boston, MA (617-423-4412; www.primr.org/).
Business ethics conferences, The Conference Board, New York, NY (212-759-0900; www.conference-board.org).
Center for Business Ethics, Bentley College, Waltham, MA (781-891-2981; www.bentley.edu/cbe/).
Center for Ethical Business Culture, University of St. Thomas, Minneapolis, MN (800-328 6819 Ext. 2-4120; www.cebcglobal.org/).
Center for Ethics and Business, Loyola Marymount University, Los Angeles, CA (310-338-2700; www.ethicsandbusiness.org).
Center for Professional and Applied Ethics, University of North Carolina at Charlotte, Charlotte, NC (704-687-2850; 3542 http://ethics.uncc.edu/).
Center for the Study of Ethics in the Professions, Illinois Institute of Technology, Chicago, IL (312-567-3017; www.iit.edu/).
Council of American Survey Research Organization (CASRO), Port Jefferson, NY (631-928-6954; www.casro.org).
Dartmouth College Ethics Institute, Hanover, NH (603-646-1263; www.dartmouth.edu/~ethics/).
Edmond J. Safra Foundation Center for Ethics, Harvard University, Cambridge, MA (617-495-1336; www.ethics.harvard.edu/).
Electronic Privacy Information Center, Washington, DC (202-483-1140; www.epic.org).
Ethics Corps Training for Business Leaders, Josephson Institute of Ethics, Marina del Rey, CA (310-306-1868; www.josephsoninstitute.org).
Ethics Resource Center, Arlington, VA 703-647-2185 www.ethics.org).
European Business Ethics Network Pamplona, Spain (34-948-425-600 ext. 2489; www.eben-net.org).
Graduate Research Ethics Education Workshop, Association of Practical and Professional Ethics, Indiana University, Bloomington, IN (812-855-6450; http://www.indiana.edu/~appe/).
Institute for Business and Professional Ethics, DePaul University, Chicago, IL (312-362-6624; http://commerce.depaul.edu/ethics/).
International Association for Business and Society (www.iabs.net/).
Marketing Research Association, Rocky Hill, CT (860-257-4008; www.marketingresearch.org).
Markkula Center for Applied Ethics, Santa Clara University, Santa Clara, CA (408-554-5319; http://www.scu.edu/ethics/).
Research, Training, and Conferences (*cont.*)
The Beard Institute, Palumbo-Donahue School of Business Administration, Duquesne University, Pittsburgh. PA (412-396-5259; http://www.duq.edu/business/about/business-and-technology-centers/the-beard-institute.html).
The Carol and Lawrence Zicklin Center for Business Ethics Research, The Wharton School, University of Pennsylvania, Philadelphia, A (215-898-1166; www.zicklincenter.org/).
The Poynter Center for the study of Ethics and American Institutions Indiana University, Bloomington, IN (812-855-0621; http://poynter.indiana.edu/).
World Association of Public Opinion Research (WAPOR), Lincoln, NE (402-472-7720; http://wapor.unl.edu/).
World Association of Research Professionals (ESOMAR), Amsterdam, The Netherlands (31 20 664 2141; www.esomar.org/).

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Akron Children's Hospital, Parts A and B

Abstract: Northeastern Ohio is a highly competitive health-care market, especially for the care of seriously-ill children. With powerhouse health-care institutions like the Cleveland Clinic venturing into the children's care segment, Akron Children's needed a way to differentiate itself. The research profiled in this case helped develop the positioning of Akron Children's hospital and its promotional approach, and resulted in an increase in its bed-occupancy rate, a key metric in the health-care industry.

URLs:
www.akronchildrens.org;
www.marcusthomasllc.com

Video Material: The ads developed by Marcus Thomas are on the Business Research Methods Online Learning Center.

How to use:
This case can serve as a preface for students as considering qualitative research (Chapter 6) and Exhibit 6-3 in a research project. It prepares them to build the management-research question hierarchy (Chapter 3) and Exhibit 3-2 and Exhibit 3-4 can be used as a guide throughout this process. This case also ties in to Chapter 4, where students will begin to identify the makeup of a research design from the data collection stages through to the analysis. You can also use Chapter 5 to discuss the sampling method used by Marcus Thomas LLC for this project. Some sample questions are provided which allow you to discuss measurement (Chapter 10), rating scales (Chapter 11) and questionnaire design (Chapter 12).

Discussion Questions, Part A

1. **What is the management-research question hierarchy for Akron Children's Hospital?**
   This question asks the student to distinguish between what is driving the research and what Marcus Thomas must do.
   Management question: How does Akron Children's Hospital distinguish/differentiate itself from Rainbow Babies & Children's and from Cleveland Clinic as a source of children's medical care.
   Research Question: What process do parents use in choosing a source of medical care for their seriously ill children?
   Investigative questions: What steps are included in the decision process? What criteria are used in the process? How are an institution's medical capabilities evaluated? How is level of care evaluated? Did emotional or rational criteria dominate in the decision? How does Akron Children's index against its main competitors in the region on these criteria?

2. **What are the advantages/disadvantages of an observation study for this research?**
   While conversation with parents and children would be likely to reveal deeper feelings and motivations, this is a high-stress situation (seriously ill child) in which a researcher should not interfere. The ability to watch, listen, and learn is the best method in this situation as participants in the study would not likely want to be interrupted.

3. **If you were designing such an observation study, what would you direct researchers to record/look for/listen for?**
   Students should be asked to brainstorm behaviors to watch for that would indicate emotional and physical stress, anger, confusion, comfort, relief, satisfaction, understanding, etc. This is a good time

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to relate the difference between the condition or emotion and the behavior of that emotion. Do tears represent sadness, happiness, relief, fear, etc.?

Students should also be asked whether to observe the child in this situation or the parents or both, and why? The child in this situation may be less likely to alter his or her behavior as he or she may not fully understand, at least initially, the gravity of the situation he or she is facing. Parents, however, may be trying to block their true concern level, their fear, from their child, so their behaviors may be altered. How would a researcher be able to tell the true emotional response from the altered one?

4. **What does the *brand promise* recommendation reveal about what researchers experienced and concluded from their study?**
   Researchers learned that the decision was emotionally derived. Their brand promise reveals several drivers of the decision: energy, creativity, technology, compassion, technical skill, and competence. The key promise…*to help every child in Akron Children's care reach his or her full potential* is a recognition of the finding that parents while they might want miracles, do not necessarily expect miracles. They want the best outcome possible for their particular child.

5. **What ethical issues would surface in hospital studies in general and this study in particular?**
   This is an opportunity to use Exhibit 2-2, where the ethical issues related to research are summarized. Of particular note in this research is the participant's right of privacy and informed consent (parents agreed to be observed, as did doctors). In this situation, medical ethics (confidentiality) might war with the needs of the research. Some students might argue that a doctor/patient should never be asked to participate in research due to medical ethical concerns. Hopefully, other students will argue that in order to improve or maintain high quality health care, research should be ongoing.

   Another ethical consideration that students should raise is the sponsor's right to quality research. Is the observation of a relatively small number of patient/doctor interactions sufficient to draft such a brand promise? This is a good time to discuss the smaller sample sizes in exploratory research and in qualitative research (as compared to quantitative research). Why would a smaller sample size be necessitated in this phase of Akron Children's research? Of particular note in the case is the line that described Marcus Thomas LLC as the "long-time research and communication partner" of Akron Children's Hospital. In such a situation, Marcus Thomas would have access to prior research findings, and would have a history of the special criteria for research in the medical field.

Discussion Questions, Part B

1. **Develop a focus group discussion guide for the research described above.**
   a. **What topics should be discussed in what order?**
      The case reveals the primary areas of discussion (parents perception of hospitals that conduct medical research, physician and hospital selection process, criteria for selecting an acute care hospital (hospital stay in excess of three days), and sources of information parents considered most frequently. The task for the student is to put them in a logical order for discussion. Also, the student must determine whether the pretasking exercise would or influence the order.

   b. **What pretasking exercises might be relevant?**
      All the parents were to have experienced an acute care hospitalization with a child between 1 month and 18 years of age. Students should be asked to discuss what pretasking exercises are for and what some of those exercises might be.

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Any pretasking should be done to help participants in focus groups bring their feelings and attitudes about that experience to the surface. Some of the focus group participants might have a recent experience, where the details are still readily remembered. Other participants might have experienced the acute care incident long enough ago that the details need to be recalled. Thus a pretask that asks the participant to write out their story of the incident would work to have them recall detail. Another pretask that could help is to have them collect photos or pictures that reveal the emotions they felt during the acute care incident. Another possible pretask would be to have them complete a short survey that reveals the details of the acute care incident…when, what medical condition, what doctor, etc.

c. What exercises might you use during the focus group?

This question asks the student to consider the time frame of a focus group (90minutes to 2 hours) and that participants can be asked to do activities other than talk during the time frame.

For this particular time frame (120 minutes) exercises might focus on ways to extract and order criteria for physician and hospital selection. One exercise that works well for this type of topic is a card sort, where each card contains one criterion mentioned in group discussion. Participants can be asked to identify different levels of influence by sorting criteria into different piles (e.g. high, medium, low, no influence). Subsequent discussion can reveal the emotional or rational reasons why one criterion was evaluated as more influential than another.

2. Evaluate the use of the telephone as the method for the survey.

Students should mention that a communication study is the only way to understand motivation or emotional connection. Given that Marcus Thomas is evaluating the effectiveness of the message used in their advertising, they need to understand how the message has been interpreted (is it increasing Akron Children's positive perceptions or not), as well as whether or not the participant has noticed or is aware of the advertising, another metric to measure effectiveness. Students should be encouraged to compare telephone to personal interview or self-administered studies on the web or through the mail.

3. Evaluate the questionnaire used for the telephone survey. Make sure to discuss scale type, question wording, question number, topic order, transitions, and interviewer directions.

This is a great all-class session. Students can be asked to debate the merits of different levels of scales (nominal, ordinal, interval, ratio) as well as they type of scale(s) used. They can debate the actual wording of questions and alternatives, whether all topics are sufficiently covered—or covered too extensively. Using various exhibits in Chapter 12, would be the place to start your students on this exercise.

4. Interviewers screened potential participants for whether they were the health care decision maker in the household and whether children were in the household. Identify other criteria that might have been used for screening and offer reasons for its inclusion or exclusion.

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Marcus Thomas is trying to evaluate the quality of the message used for Akron Children's verses those of other children's acute care facilities in the market area. As it wants a representative sample, it could have screened for specific hospital of use (assuring them of sufficient numbers of competitive hospital users), age group (would older parents perceive the message differently than younger parents), age group of children (would parents of young children interpret the message differently than parents of teens?), or possibly gender (would men perceive the message differently than women. Because Marcus Thomas is evaluating response to media messages, they also could have screened for media consumption.

5. Evaluate the sampling decisions:

a. Was this an appropriate sample size?

This is a great time to discuss key sampling and budgeting issues. Appropriateness of sample size is determined by desired level of confidence and precision, but also by available budget. If Akron Children's was satisfied with 95% confidence, plus or minus 3 percentage points of precision, then the sample was 'appropriate.' Students should be asked to argue whether the levels specified for confidence and precision should be higher given the competitive battle for acute care patients.

b. What parameters might have been used in structuring this sample?

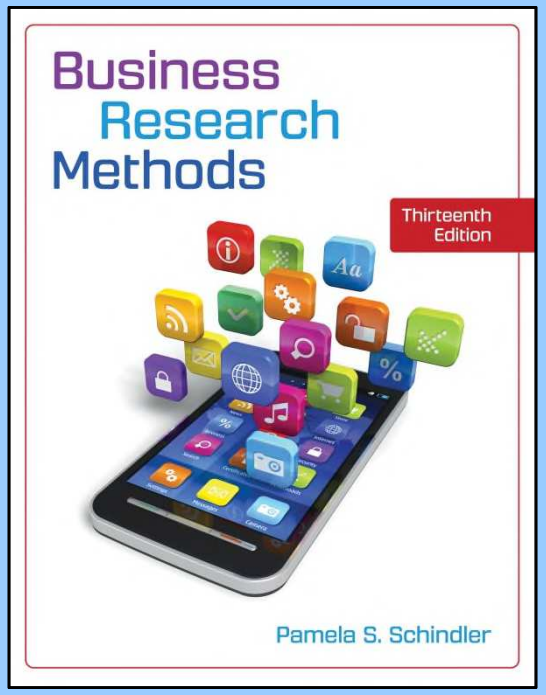
The case implies that hospital experience with a child and the high-acuity experience for a child (hospital stay of three or more nights) were the two most important parameters. Since they obviously wanted to reach out into other counties (other than Summit county where Akron Children's Hospital is located), then county of residence should also be important or distance from home to hospital. Ultimately, participants needed to have seen the commercials created by Marcus Thomas for Akron Children's Hospital, so screening participants on media consumption would also be important.

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Chapter 2

THE RESEARCH PROCESS: AN OVERVIEW



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Research Thought Leaders

"Today, individuals increasingly keep their emails and documents on remote servers in data centers—in short, in the cloud. But the transition to the cloud does not alter people's expectations of privacy."

Brad Smith,
president and chief legal officer,
Microsoft

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Learning Objectives

Understand …

- The standards of good research.
- What is happening within each stage of the research process.
- Research process pitfalls and their solutions.
- Ethical issues at each stage in the process.

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Actions that Deliver Effective Research



- Clearly defined purpose
- Detailed research process
- Thoroughly planned design
- High ethical standards
- Adequate analysis
- Limitations revealed
- Unambiguous presentation
- Insights justified
- Conclusions justified

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Research Process

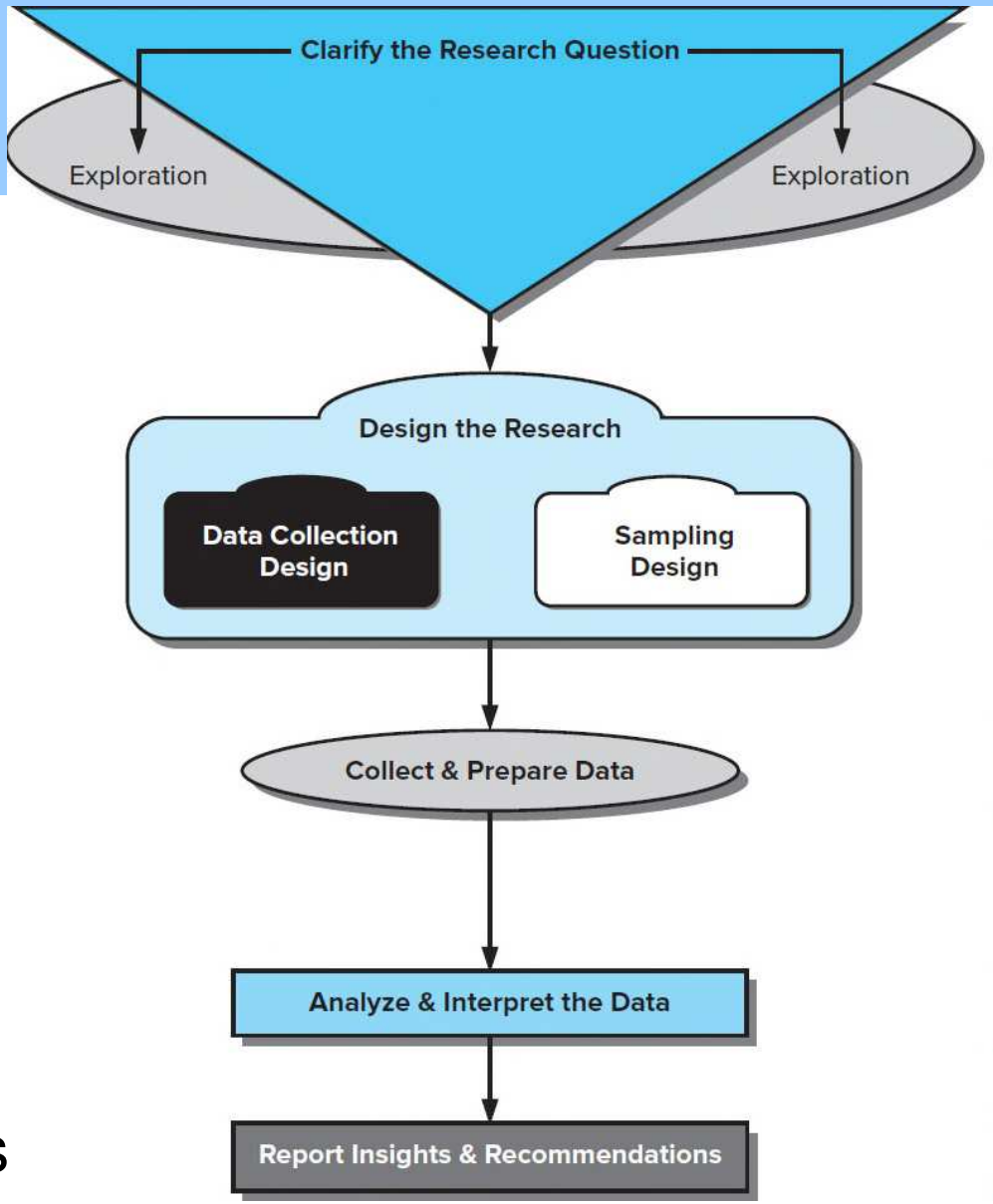
Stage 1: Clarify the Research Question

Stage 2: Design the Research

Stage 3: Collect & Prepare the Data

Stage 4: Analyze & Interpret the Data

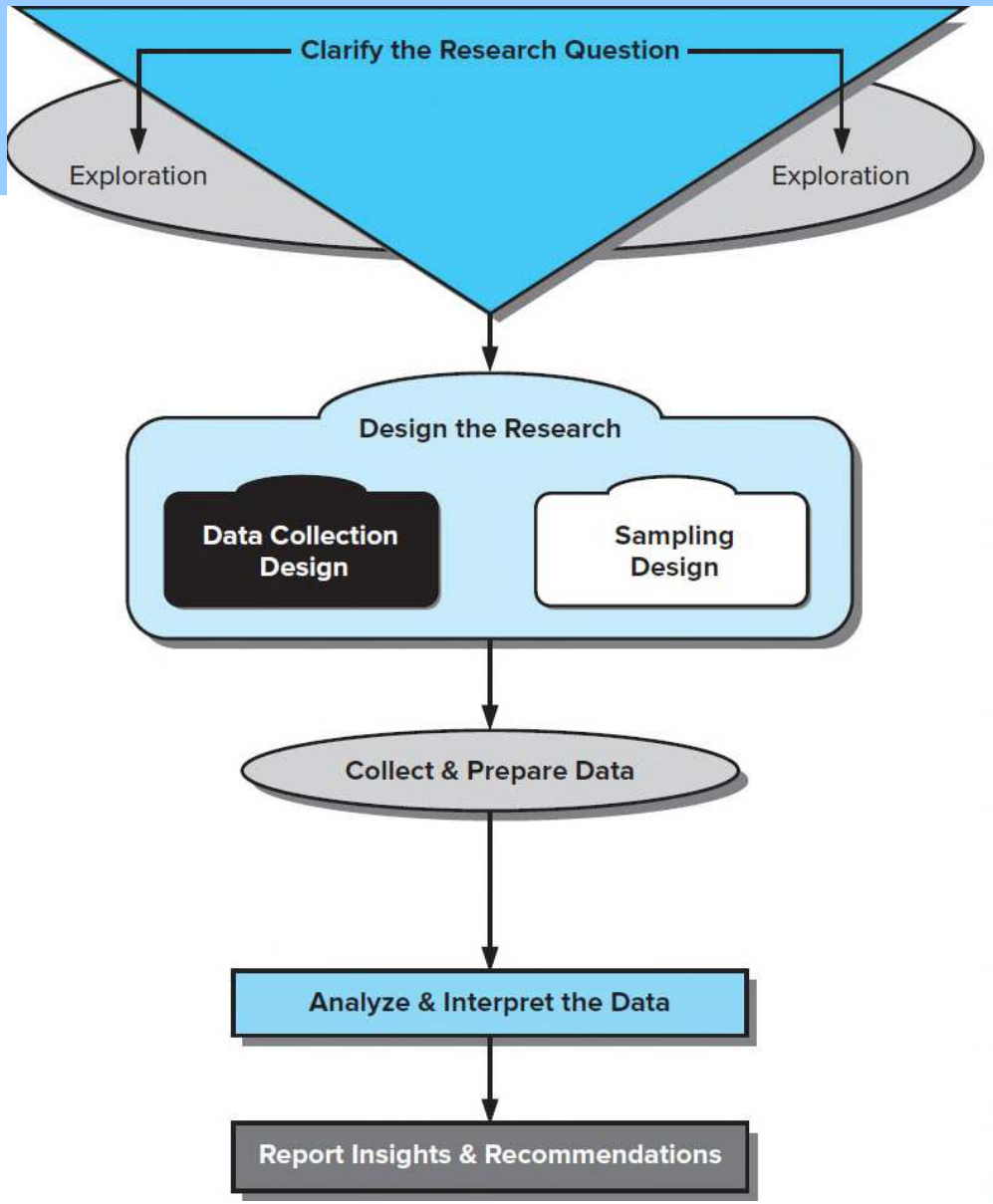
Stage 5: Report Insights & Recommendations



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Research Process

Stage 1: Clarify the Research Question



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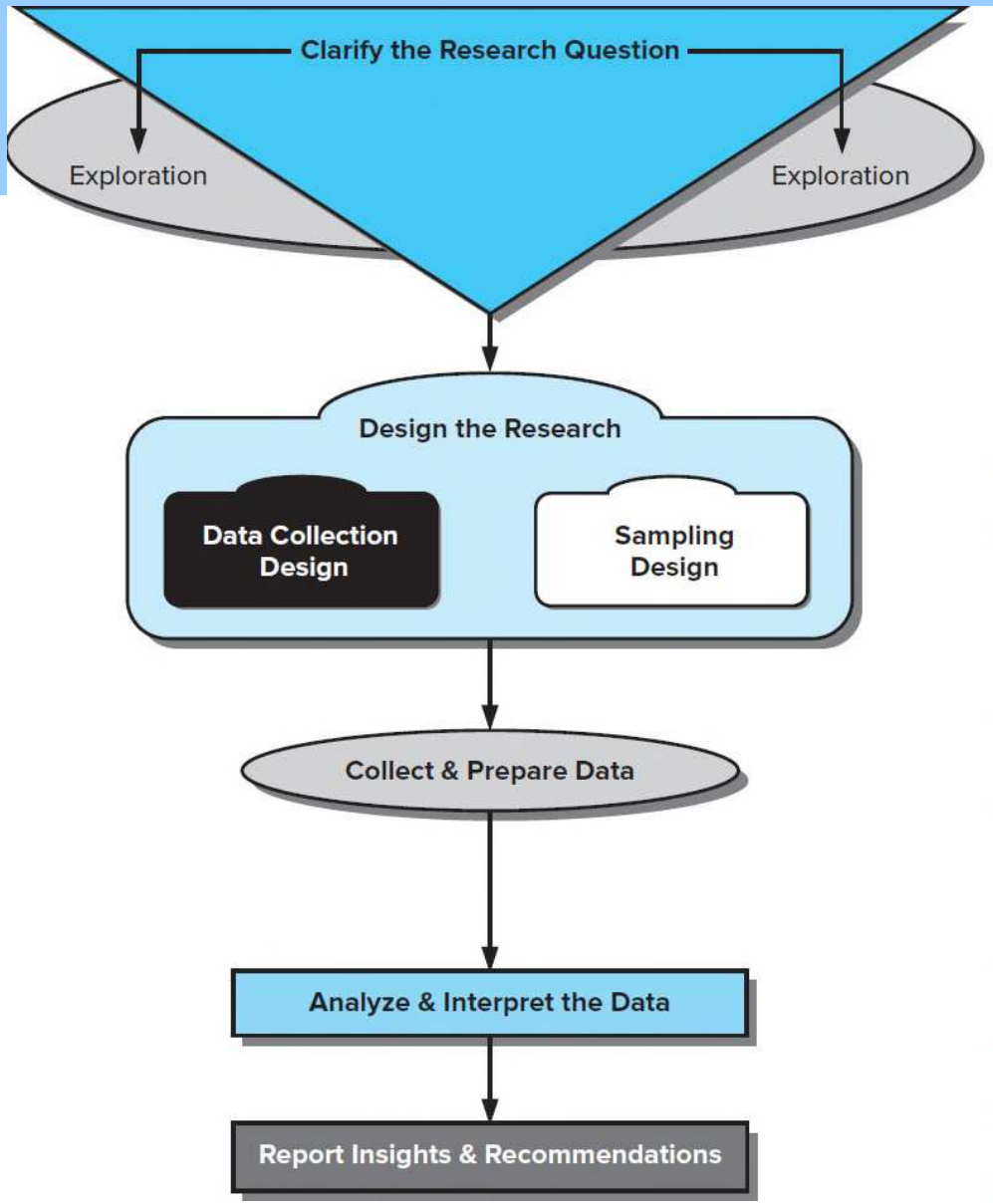
What role does **curiosity** play in exploration?



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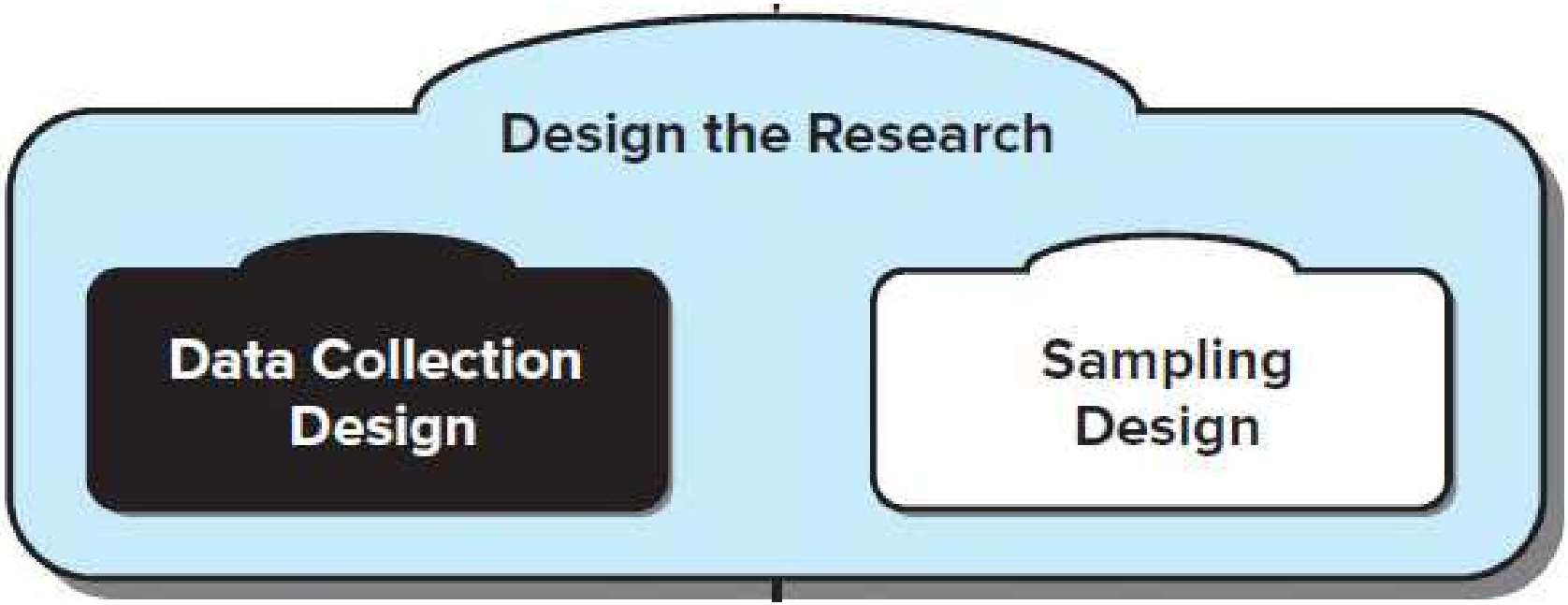
Research Process

Stage 2: Design the Research



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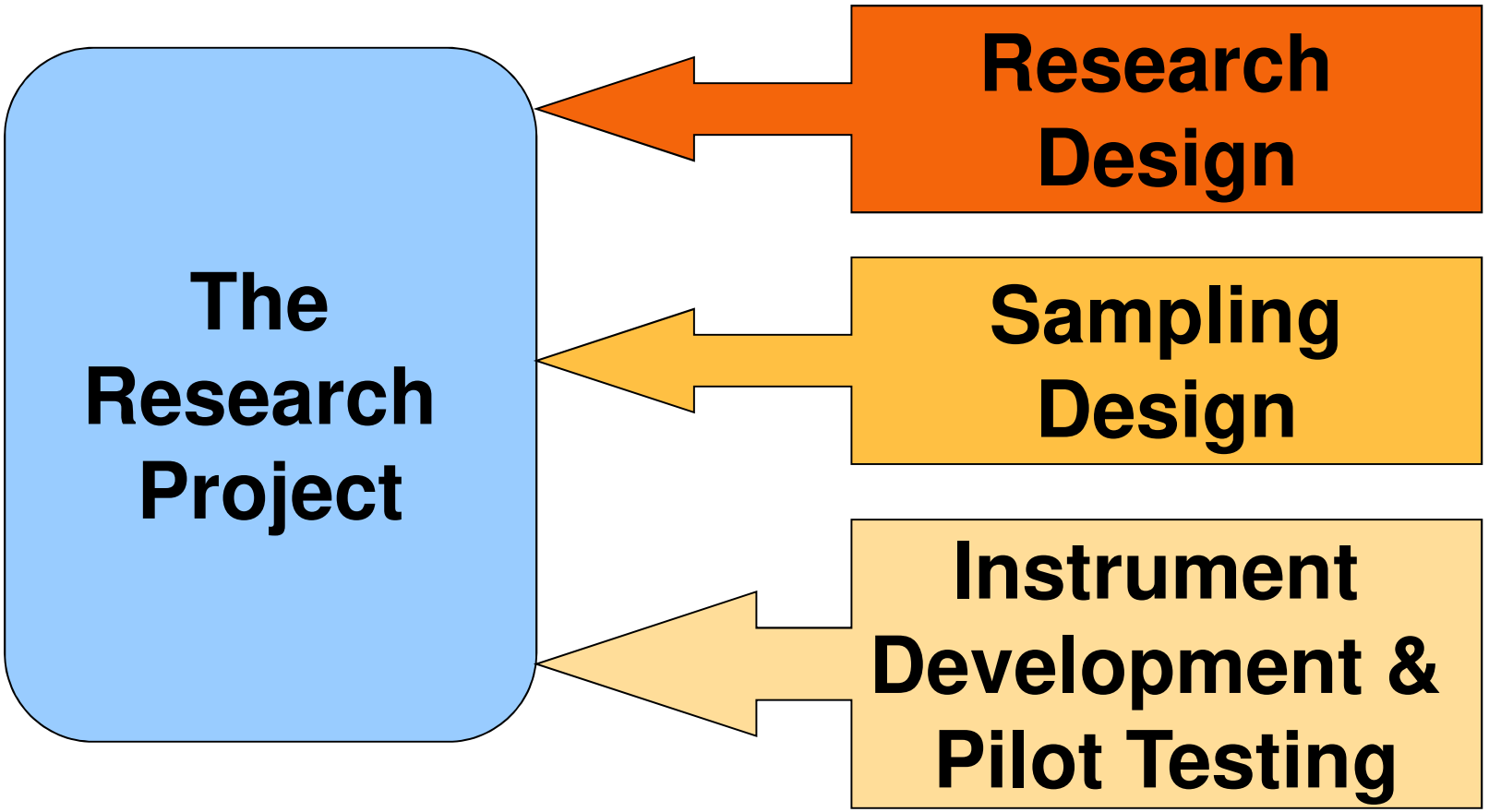
Stage 2: Design the Research



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Stage 2: Design the Research

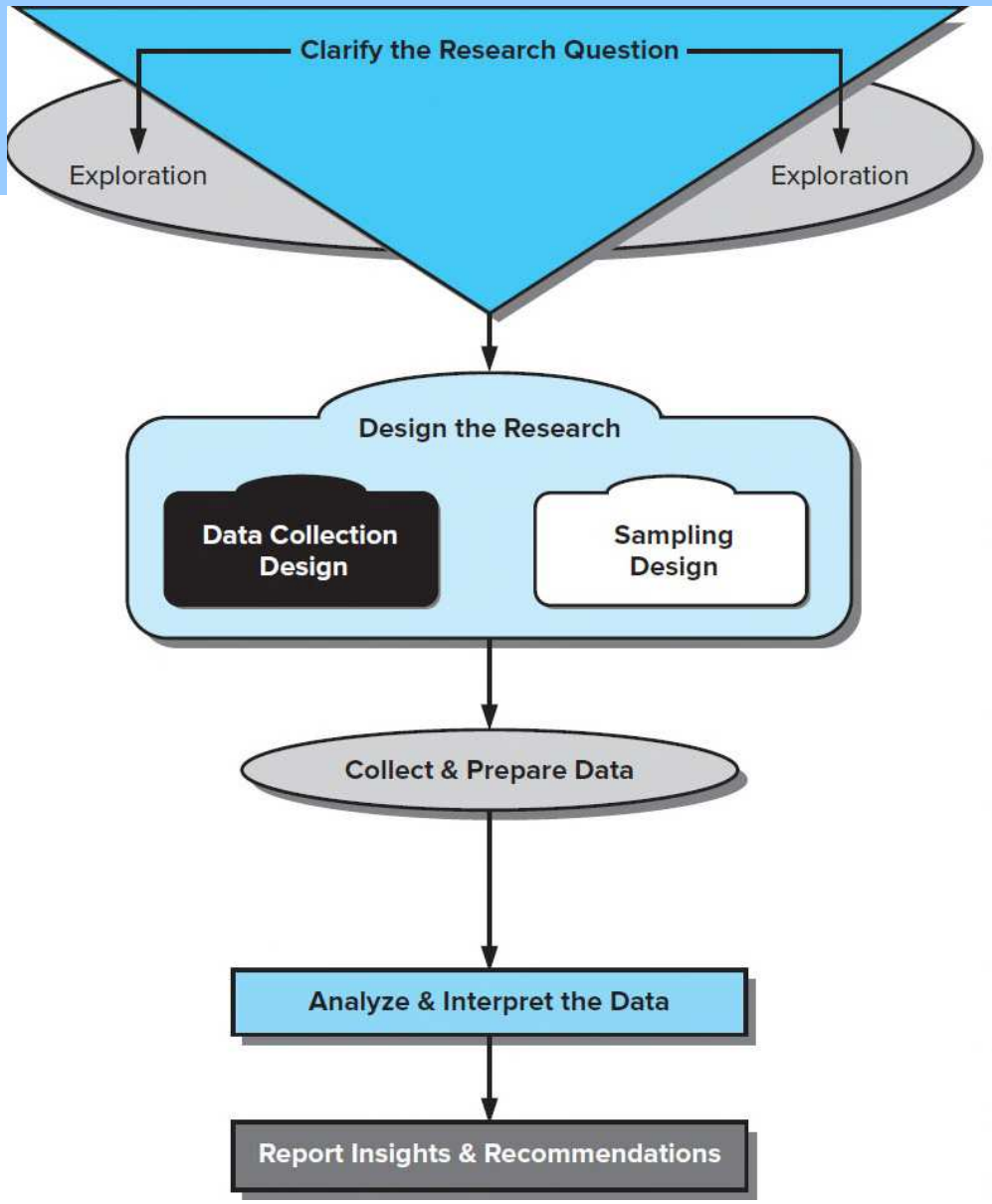


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Research Process

Stage 3: Collect & Prepare the Data



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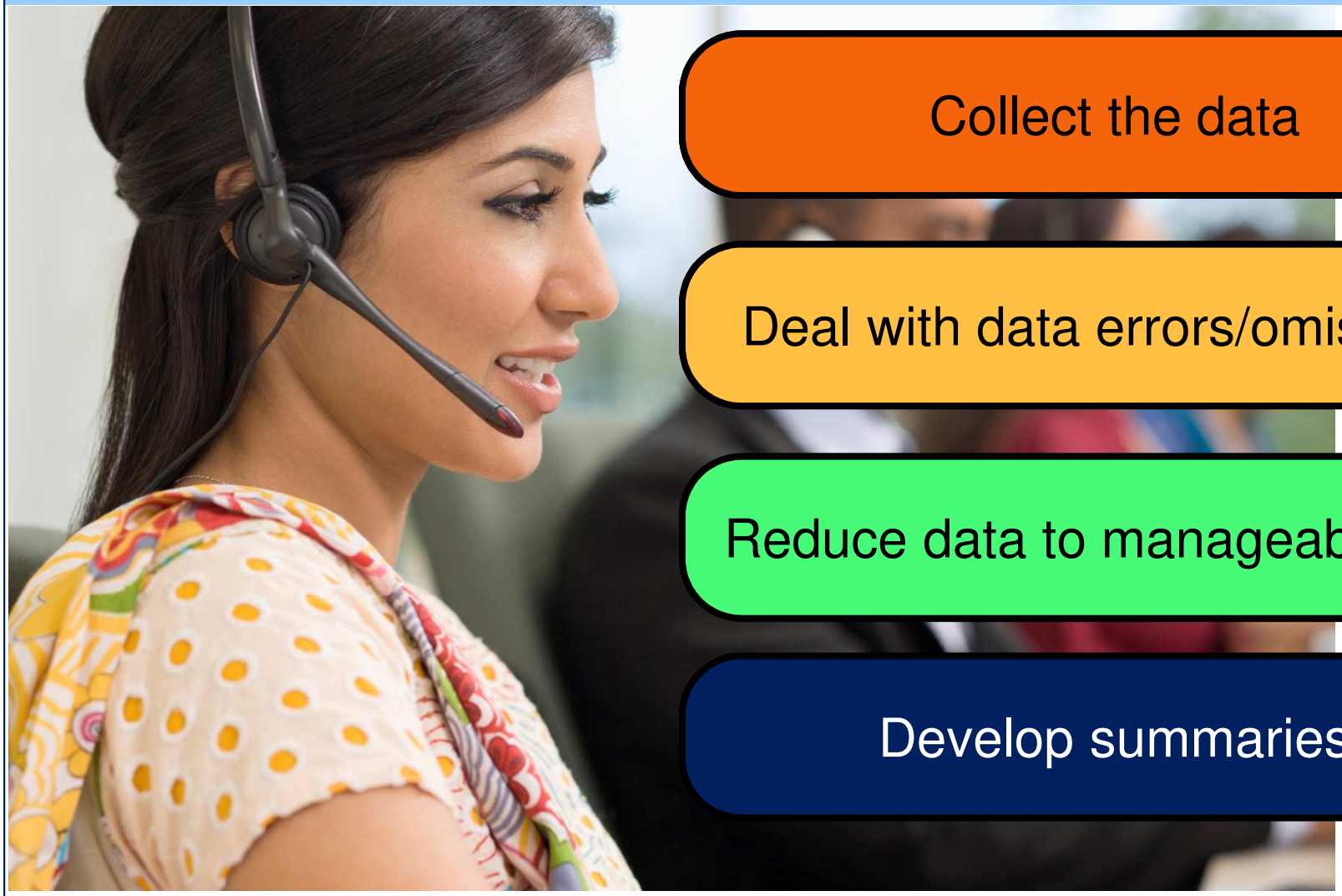
Stage 3: Data Collection, Preparation, Examination



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Stage 3:
Data Collection, Preparation, Examination



- Collect the data
- Deal with data errors/omissions
- Reduce data to manageable size
- Develop summaries

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Data Characteristics



- Abstractness
- Verifiability
- Elusiveness
- Closeness

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Data Collection Protocols

Consistency = verifiable data.

Consistency ≠ truthfulness.



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Data Types

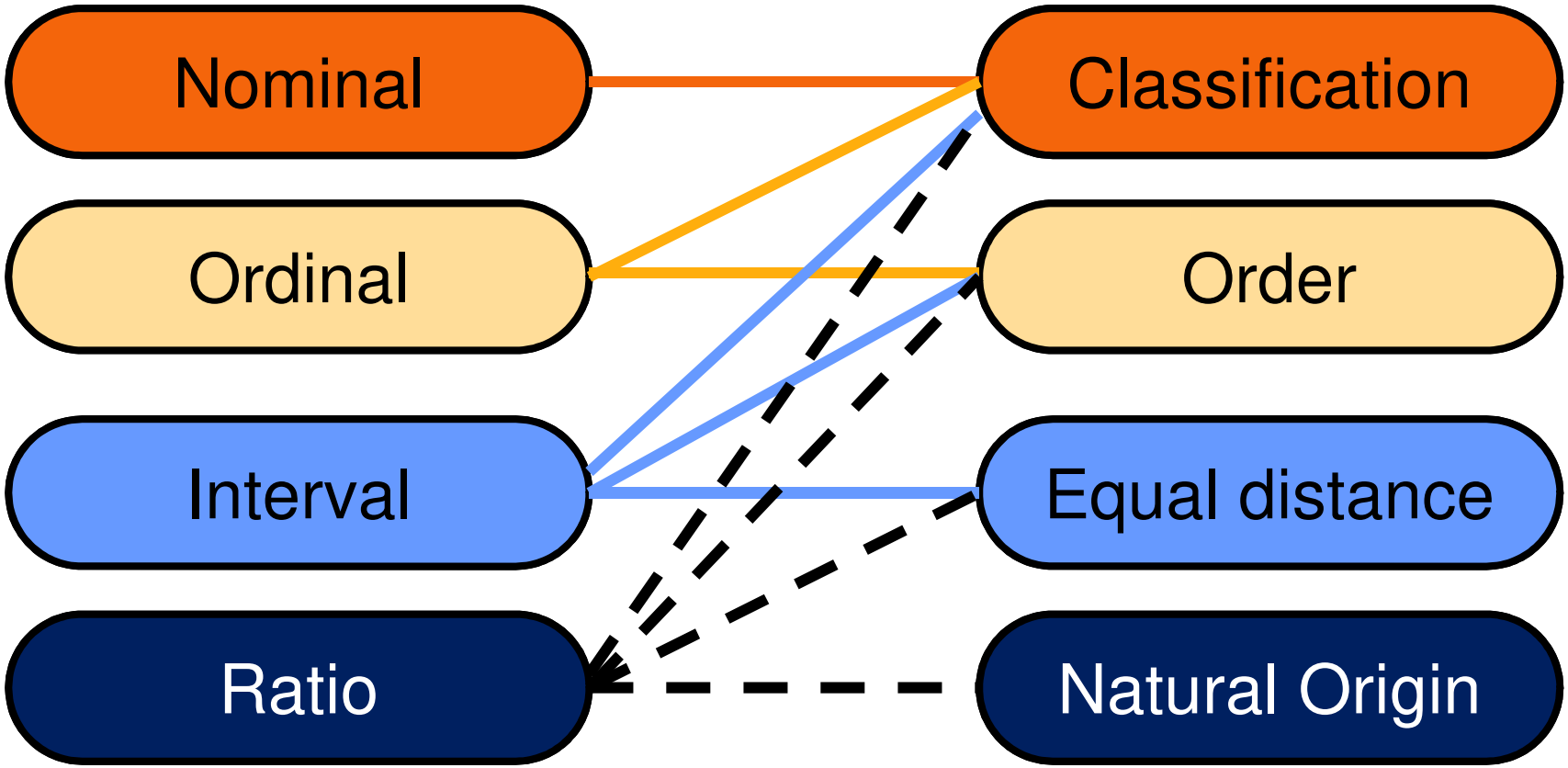
Primary

Secondary



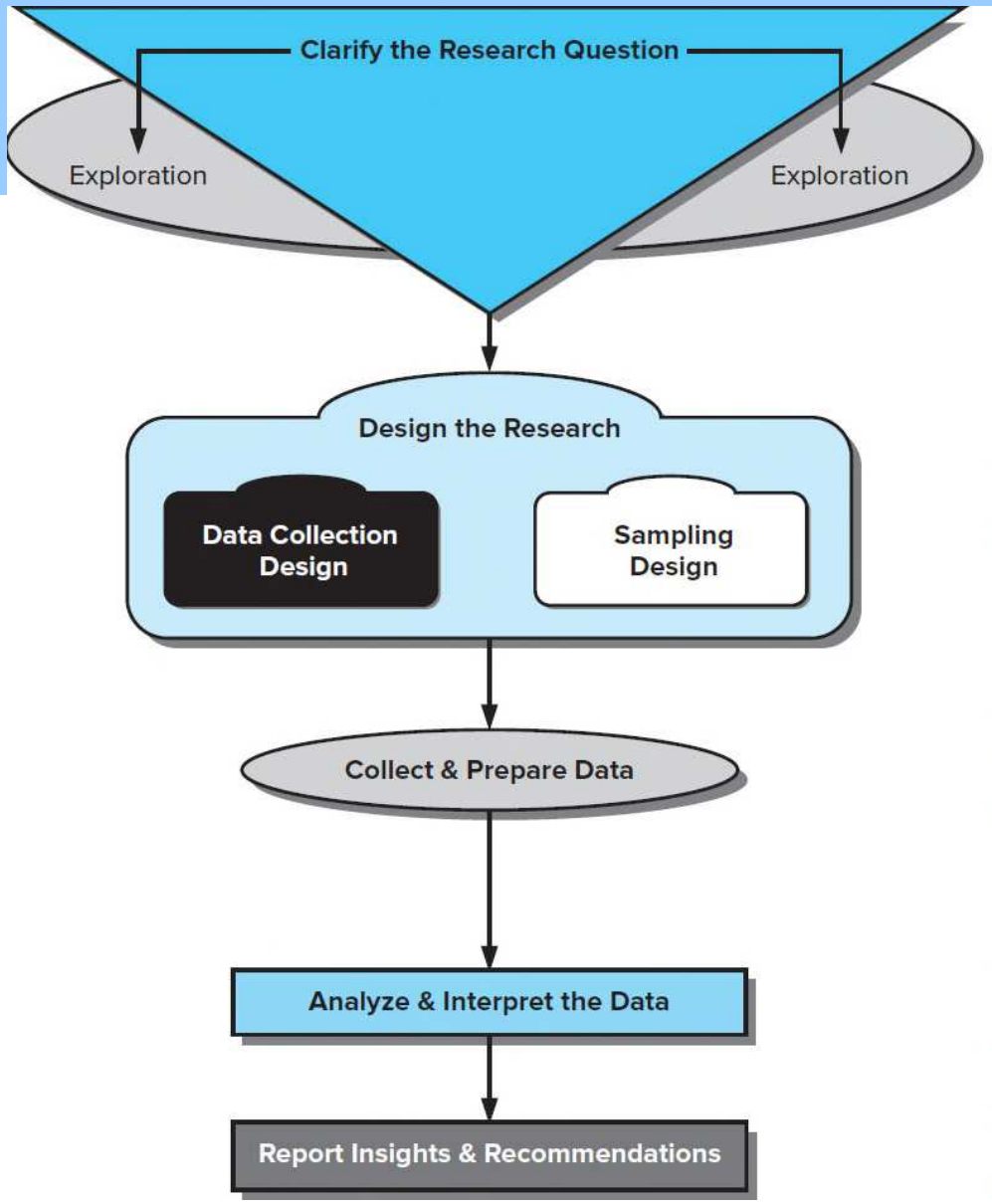
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Data Levels & Characteristics



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Research Process



Stage 4: Analyze & Interpret the Data

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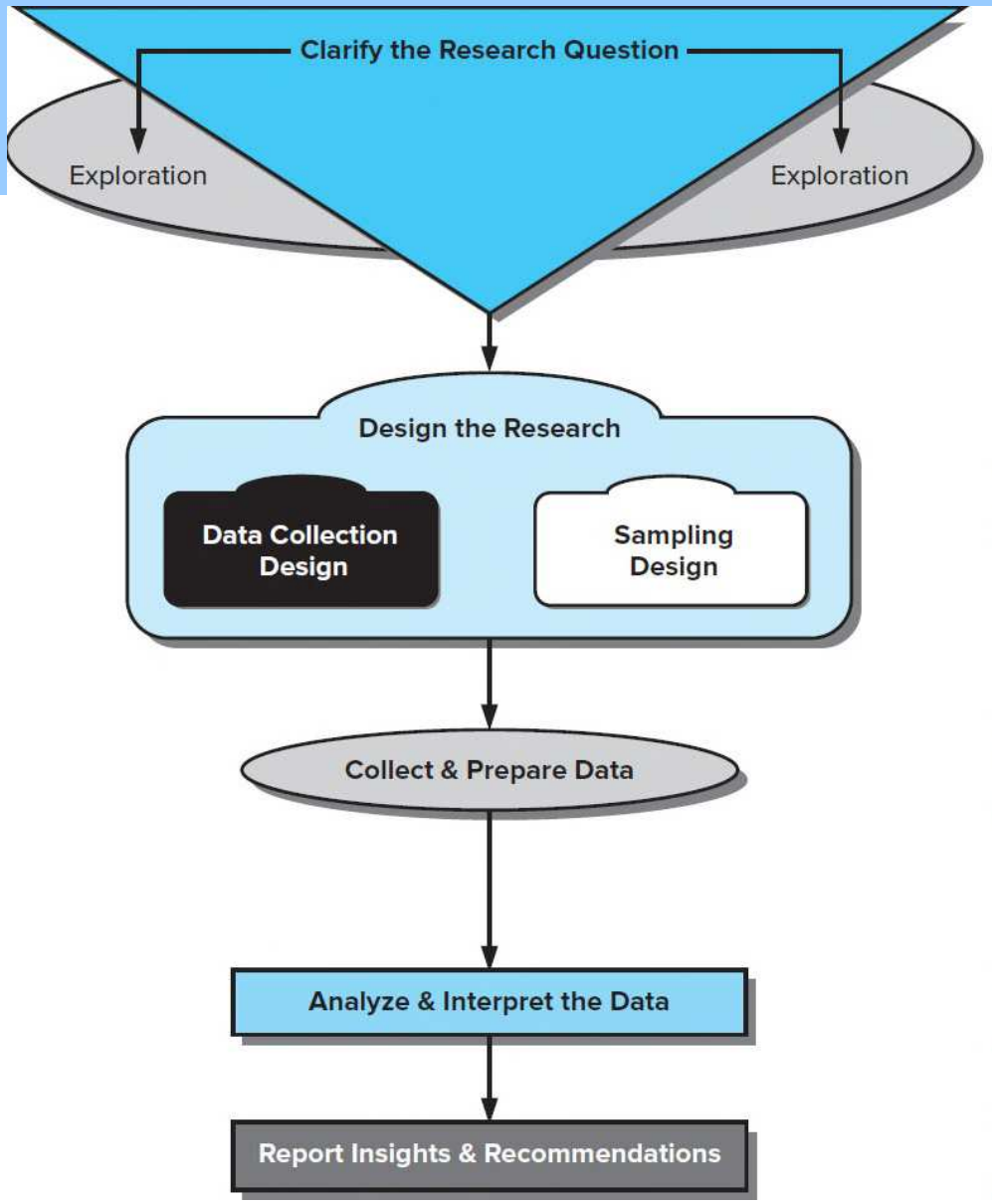
Steps in Data Analysis and Interpretation



- Refine Preliminary Analysis Plan
- Look for Patterns
- Apply Statistical Techniques
- Support or Refute Hypotheses
- Develop Insights & Recommendations

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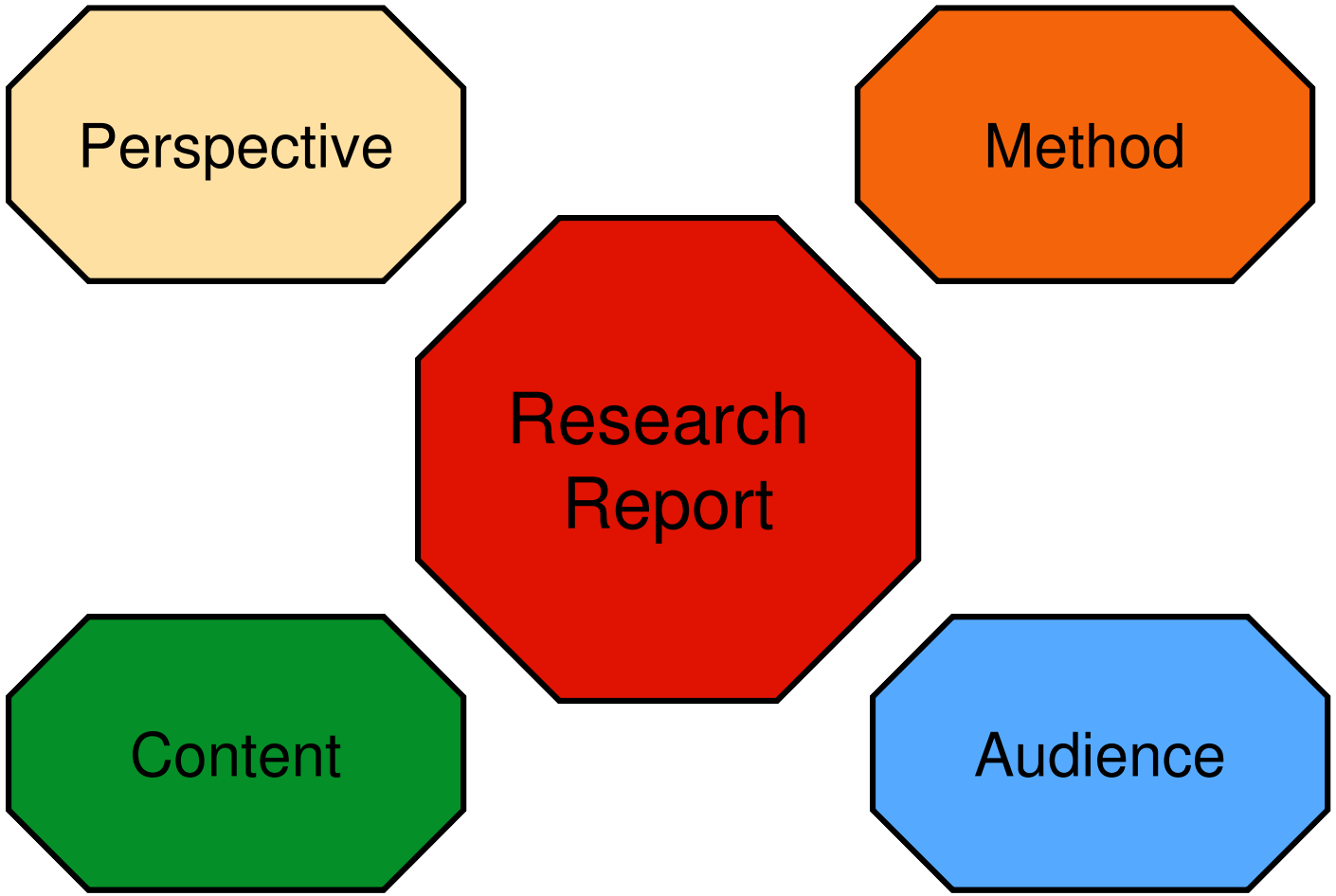
Research Process



Stage 5: Report Insights & Recommendations

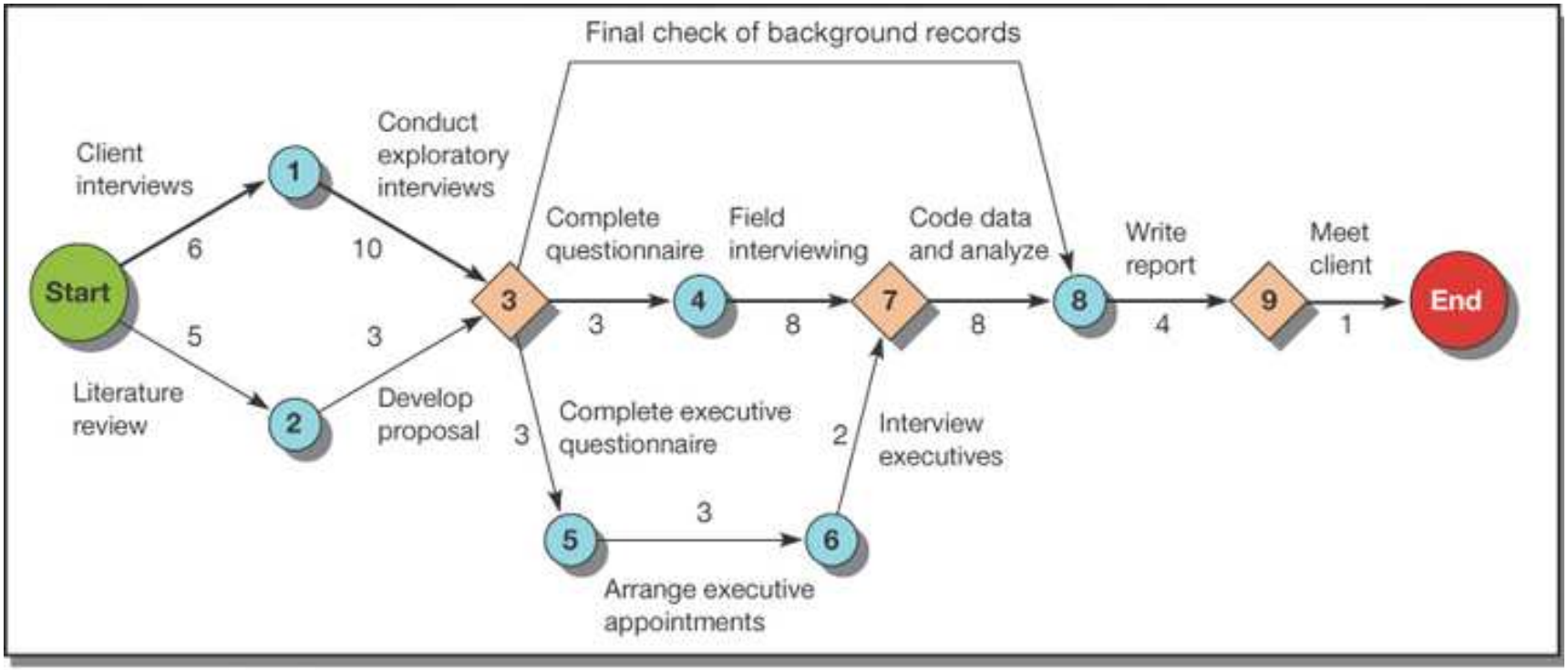
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Factors that Influence



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Research Project Time Frame



Milestones:

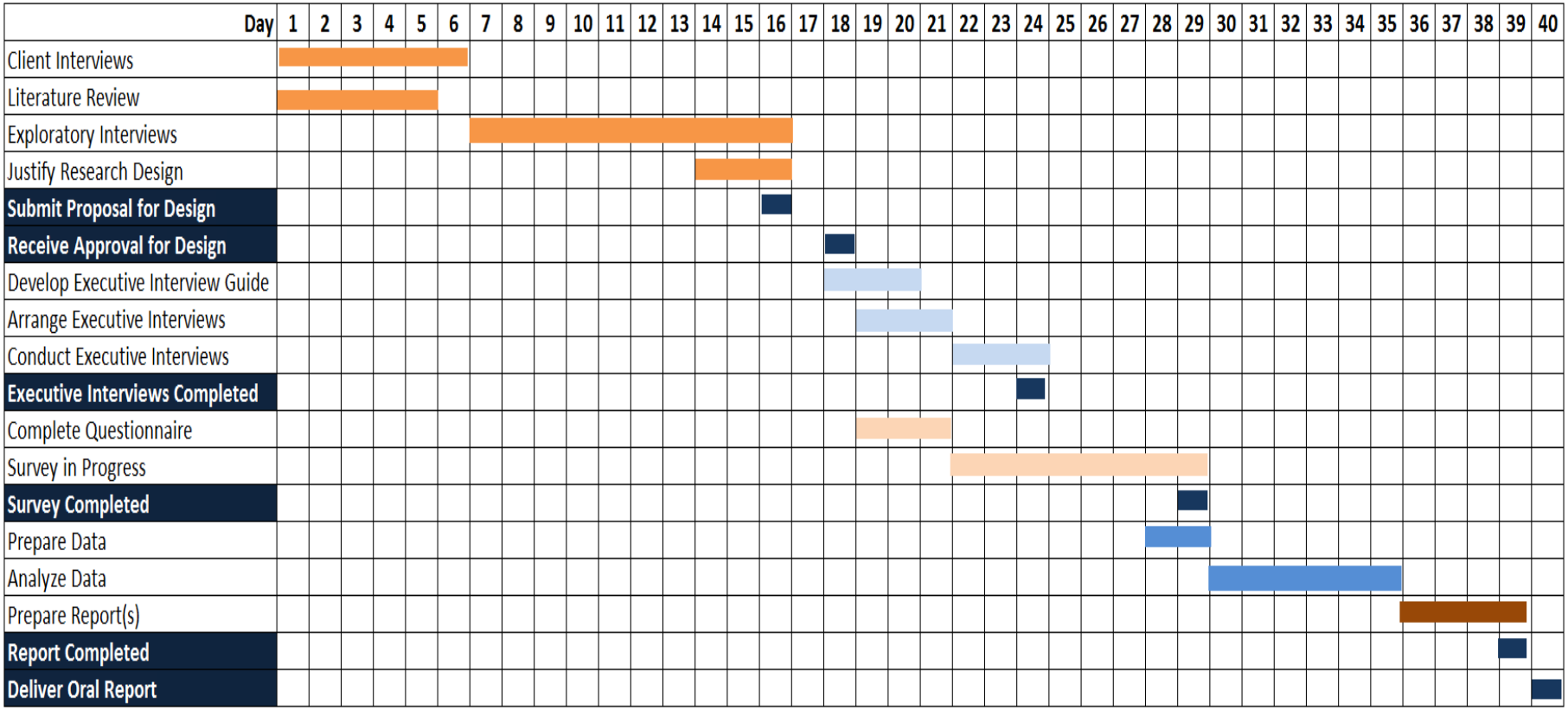
3 Proposal approval
7 Interviews completed
9 Final report completed

Critical Path:
S–1–3–4–7–8–9–E

Time to Completion:
40 working days

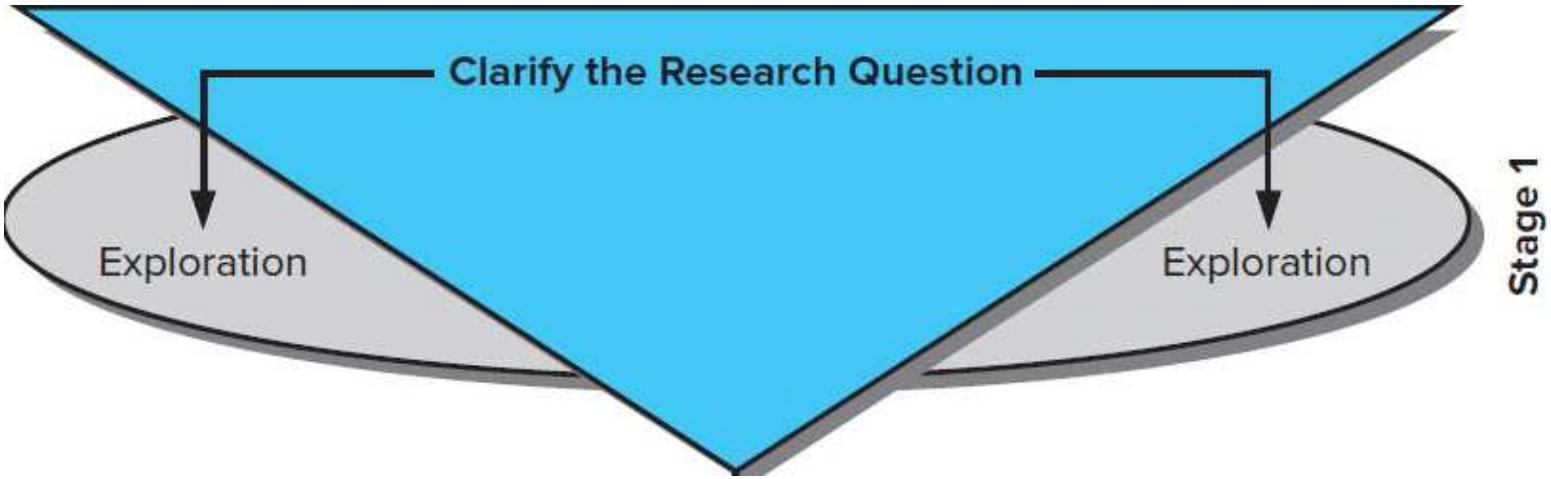
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Research Project Time Frame



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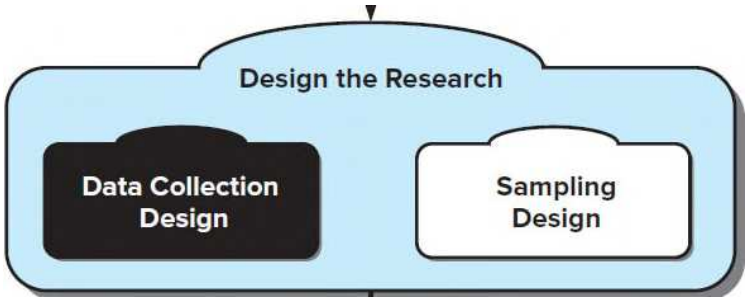
Research Process Pitfalls to Avoid



- Ill-defined Management Problem
- Unresearchable Questions
- Manager's Hidden Agendas
- Researcher Inexperience

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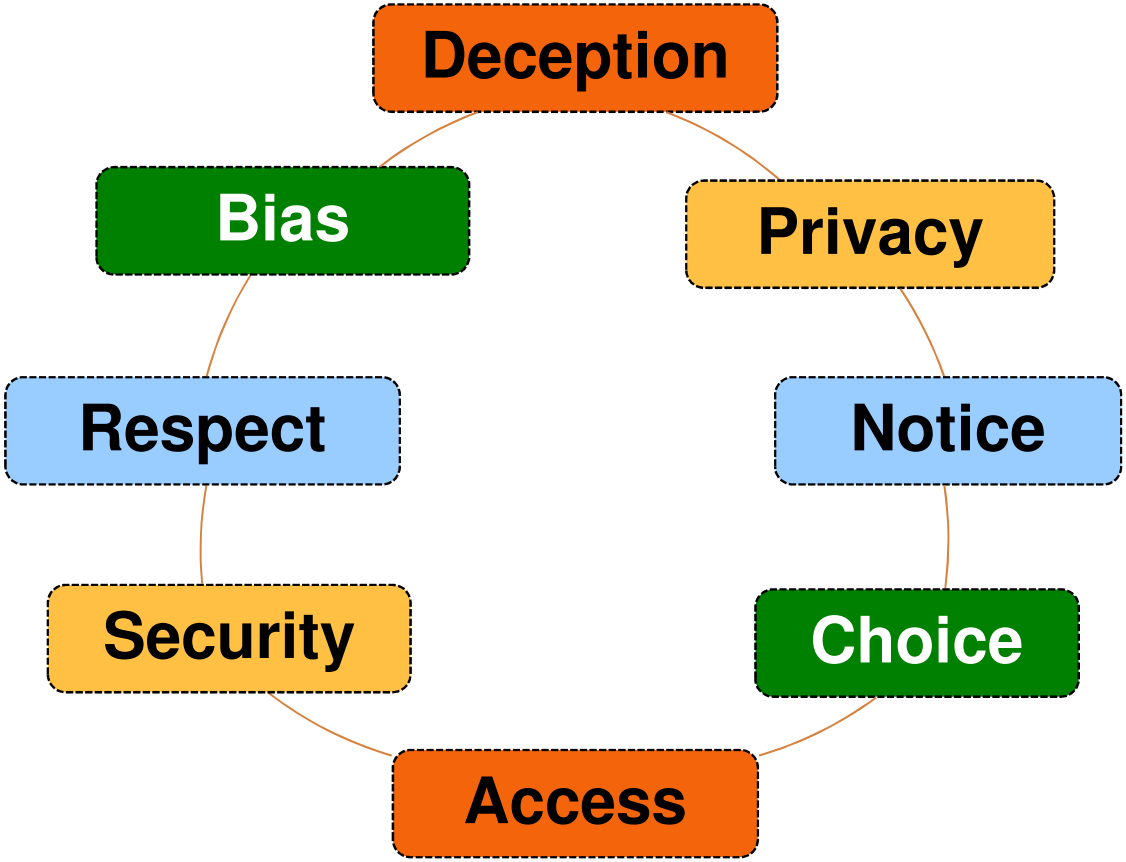
Research Process Problems to Avoid



- Overembracing Data Analytics
- Favored-Technique Syndrome
- Researcher Inexperience

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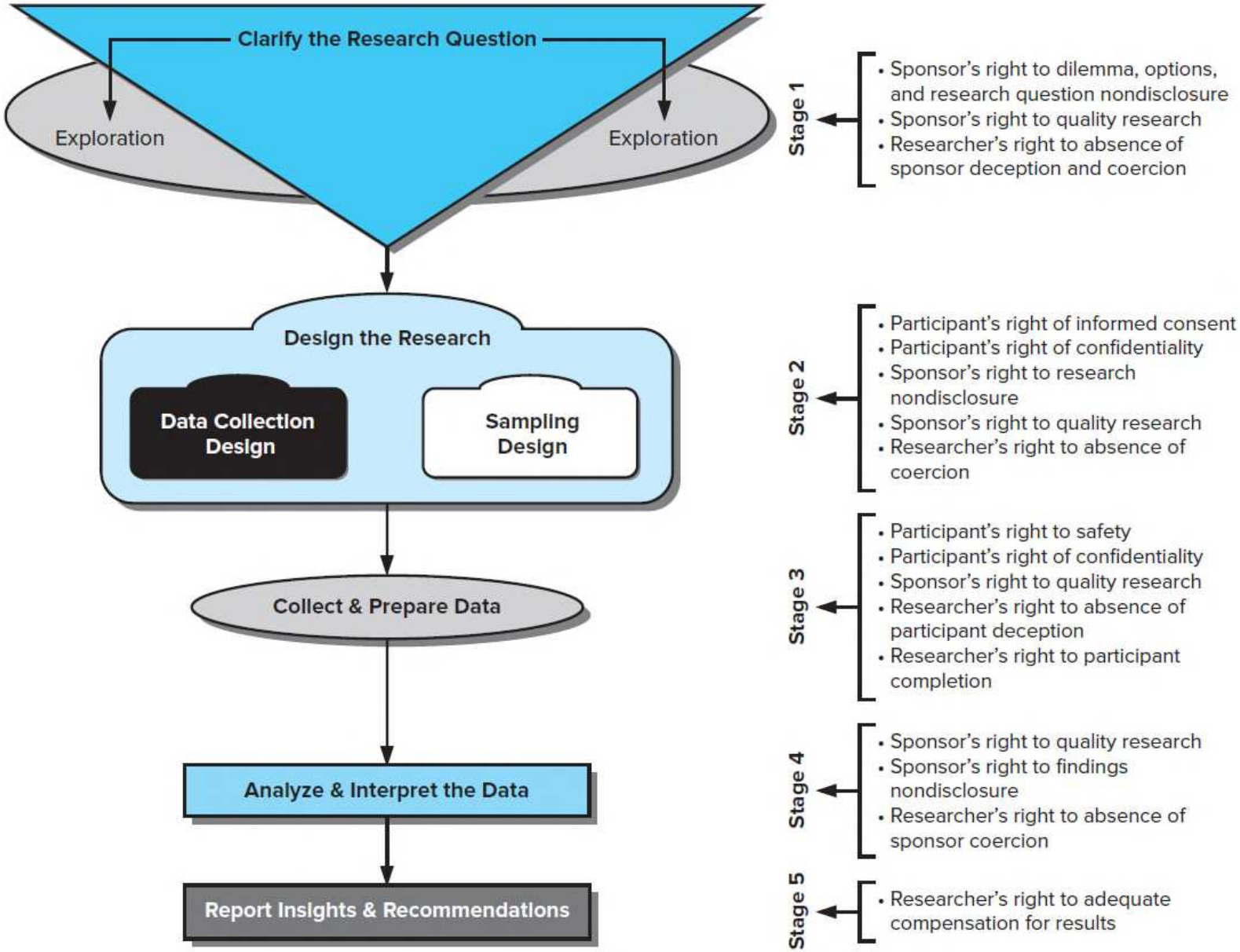
Ethical Issues in Research Process



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Research Process

>Exhibit 2-2 The Research Process, with Ethical Responsibilities



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Key Terms

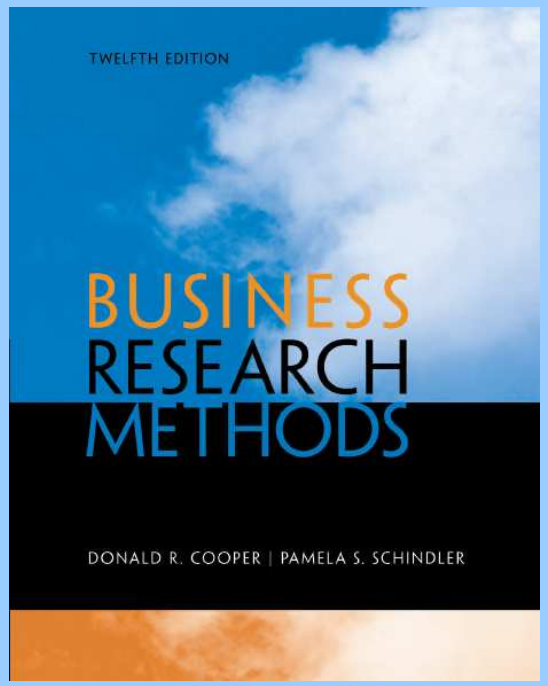
- Case
- Census
- Dashboard
- Data
- Data analysis
- Findings
- Insights
- Interval data
- Key Performance Indicator
- Management dilemma
- Nominal data
- Ordinal data
- Primary data
- Ratio data
- Recommendations
- Research design
- Research process
- Research question(s)
- Sample
- Secondary Data
- Target population

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Chapter 2

THE RESEARCH PROCESS, AN OVERVIEW

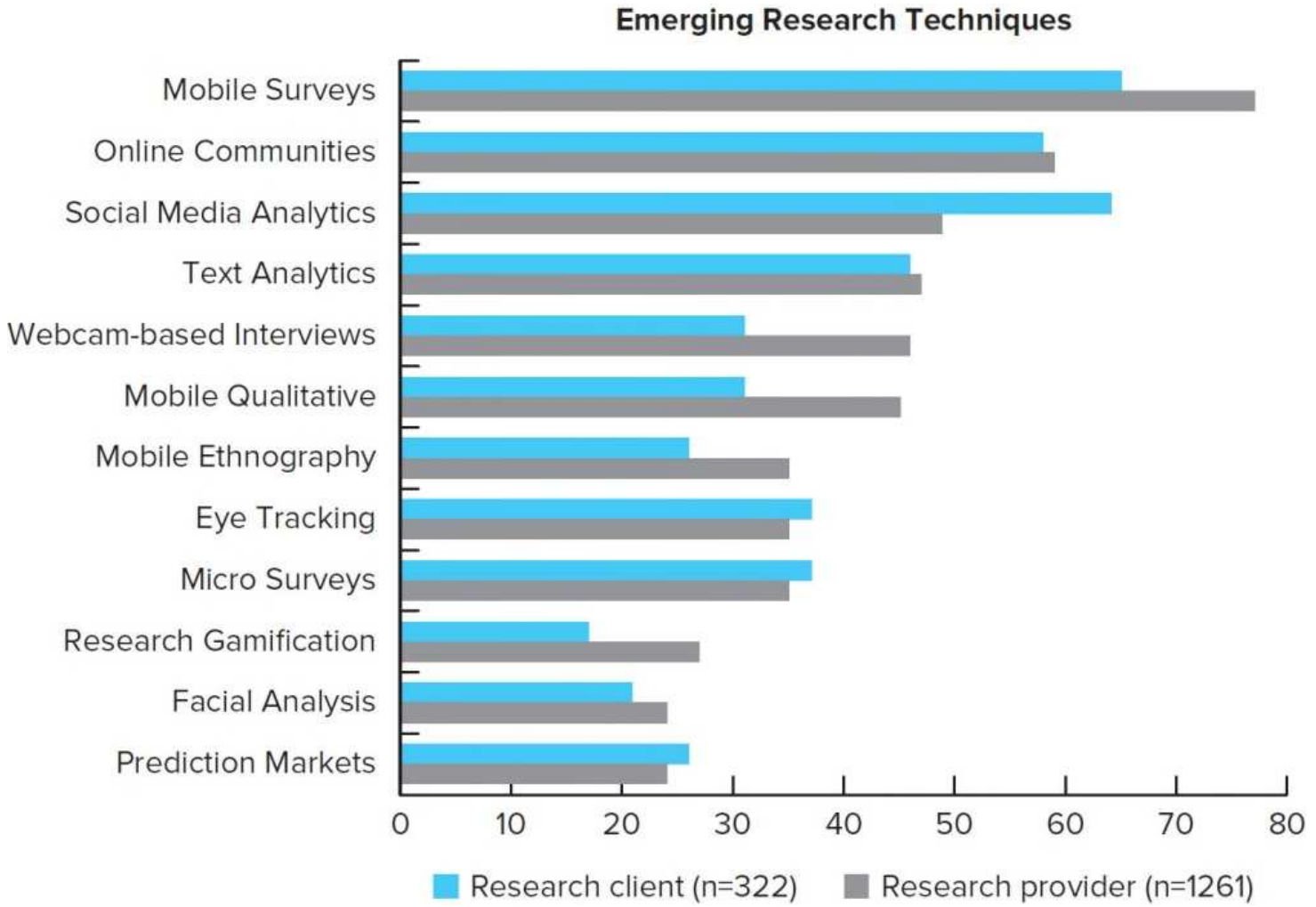
DISCUSSION OPPORTUNITIES



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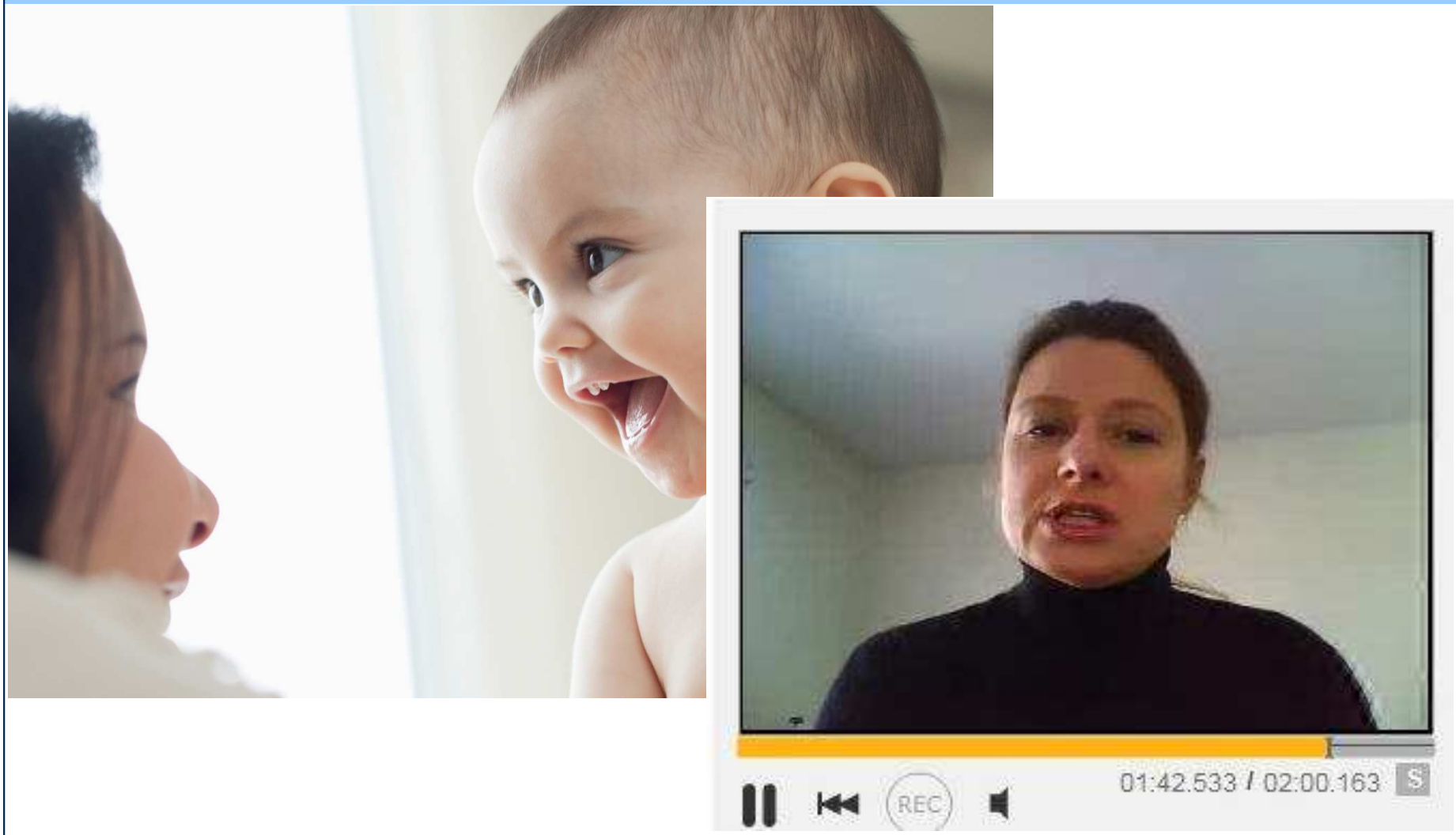
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PicProfile: Emerging Research Techniques



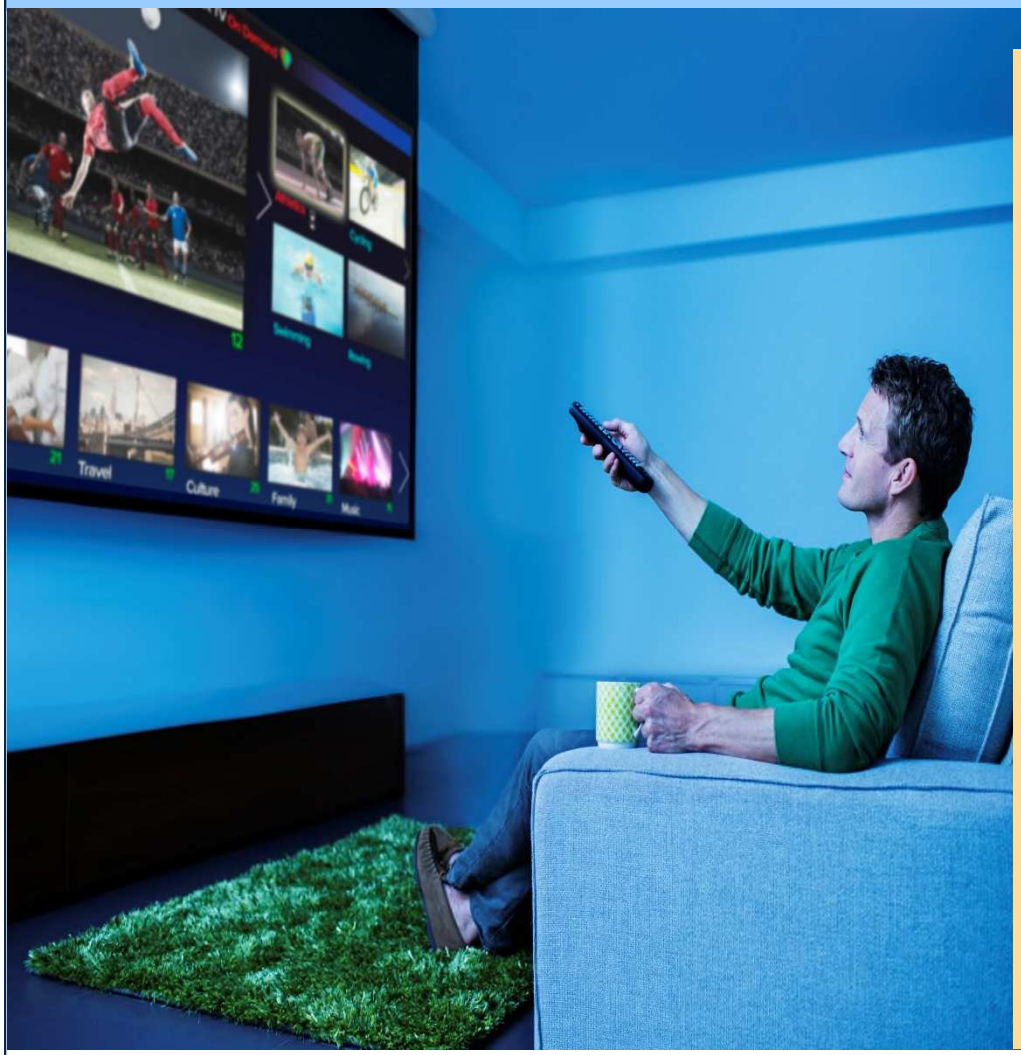
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Snapshot: Moms Video Insights



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Snapshot: Research & Programmatic Algorithms



Today's digital ads are bought via computer programmatically through an "astonishing range of complex calculations" that no human could do in the time available.

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Snapshot: Research & Programmatic Algorithms

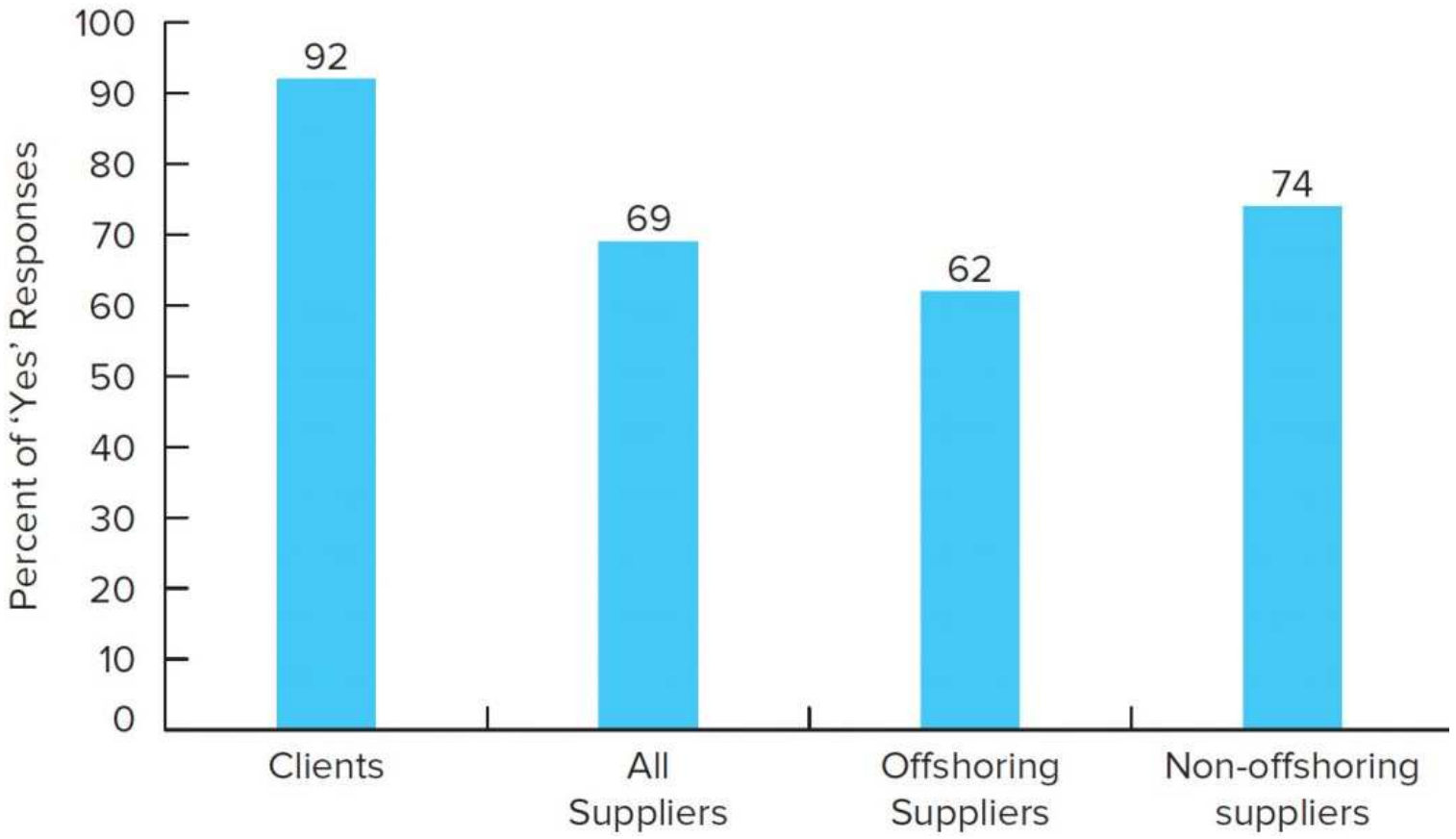


What role might research play in designing smarter algorithms?

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Snapshot: Research Leaving Country

Q. Regardless of what your stance is on offshoring, do you believe research suppliers have an obligation to tell their clients that they offshore? (n=850)



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Snapshot: Research Leaving Country



"Clients absolutely need to know about any offshore subcontracting and [its] location in order to gauge risks and protect themselves."

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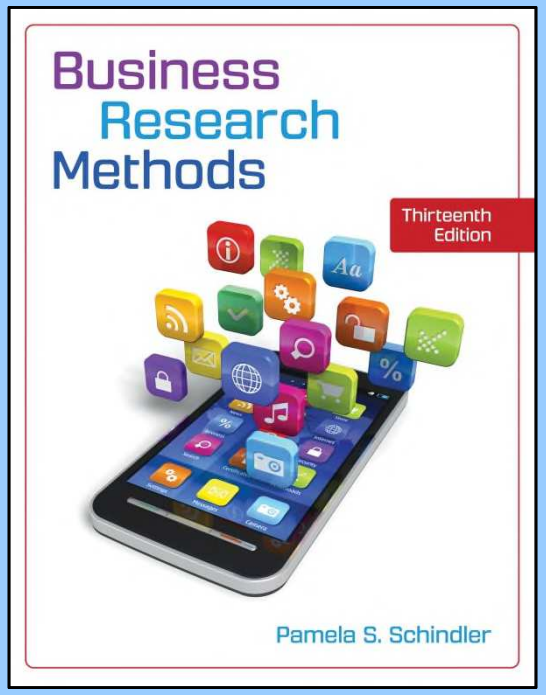
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Chapter 2

THE RESEARCH PROCESS: AN OVERVIEW



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