



ASSOCIATION
of
BRIEFING
PROGRAM
MANAGERS

PROPOSAL

for The Nineteenth Annual Multi-Client Study on

THE ROLE OF EXECUTIVE BRIEFINGS

2009 Study

Conducted jointly by:

ABPM and Decision Analyst, Inc.

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I. OVERVIEW

A. Introduction

This proposal describes the Nineteenth Annual Multi-Client Study on *The Role of Executive Briefings*.

The 2009 study will be conducted by independent research firm Decision Analyst, Inc., with analysis performed by the ABPM. It will build on the success of the previous eighteen studies and will contain many of the key questions that were included in those prior research efforts.

B. Rationale for an Annual Study

The role of Executive Briefing Centers is dynamic and is characterized by continuous change, activity and progress. Year-to-year changes may be of small significance, but have a cumulative and powerful impact over the course of a decade or more. To document changes over time, to record and analyze past events, and to create a history of those events enables us to make accurate predictions regarding the direction and magnitude of future changes.

It is highly desirable to ask the same, or similar, questions from year to year in order to:

- Establish benchmarks for new study sponsors.
- Measure the effectiveness of changes made during the last year.
- Determine *current* customer needs and levels of satisfaction.
- Adequately document changes over time so that valid and reliable trend analysis is possible.

However, the annual study itself is dynamic. Each year, sponsors make important and perceptive contributions to the nature and scope of the research. New issues emerge that must be investigated. New and important trends become evident. While an important component of the annual study is the consistency of questions that carry over from year to year, we seek and welcome new areas of inquiry.

II. OBJECTIVES

A. Overall Objectives of the 2009 Study

The objectives of this research study are to provide each sponsor with:

- *External* and *internal* customers' views of a successful Executive Briefing
- An efficient measure of year-to-year levels of customer satisfaction with the sponsor's Executive Briefing Program
- Information needed to increase customer satisfaction and customer loyalty with the sponsor's Briefings
- An assessment of the influence of Executive Briefings on business results (decision to purchase, amount purchased, length of purchase cycle, incremental revenue contribution, ROI, etc.)
- An evaluation of the contribution of Executive Briefings to relationship building and external customers' perceptions of the sponsor's company, products and services
- Information on trends observed over a nineteen-year period that may have an impact on the effectiveness and ultimate success of Executive Briefing Programs

B. External Customer Survey

To accomplish the overall objectives described above, the 2009 External Customer Survey will address the following areas:

- Influence of the Executive Briefing on purchases and on the length of the purchase cycle.
- Business results quantifying: percent who purchased, average dollar amount spent, percent purchases increased as a result of the briefings (incremental revenue contribution).
- Characteristics of a successful Executive Briefing from the perspective of external customer executives.
- Customers' evaluations of how well a recent Executive Briefing hosted by the sponsor met their expectations.
- Aspects of Executive Briefings having the greatest impact on the customer.
- Customers' rankings of Executive Briefings, compared to other information acquisition methods available to support the purchase process.
- The level of customization preferred by the customer for an Executive Briefing, compared to the level of customization experienced.
- Suggestions by customers on steps vendors can take to improve the value of future Executive Briefings.
- Information about what other companies' briefings your external customers have attended, and how your program's briefings compare to those.

C. Internal Customer Survey¹

To accomplish the overall objectives described above, the 2009 Internal Customer Survey will address the following areas::

- When Executive Briefings are used and for what primary purpose.
- Characteristics of a successful Executive Briefing and Executive Briefing Program from the perspective of internal customers.
- Where in the sales cycle Executive Briefings are most frequently used by the internal customer.
- Internal customers' rankings of Executive Briefings compared to other marketing tools available to support the sales process.
- The internal customer's perception of the influence of Executive Briefings on purchases and on the length of the sales cycle.
- The use of Executive Briefings to achieve strategic objectives such as building long-term relationships.
- Suggestions by internal customers on steps Executive Briefing Managers can take to improve the value of future Briefings.

¹ The internal customer study will be conducted if there is a minimum of four sponsors. A 10% discount will be applied to the study cost for sponsors who participate in both the external and internal customer studies.

III. RESEARCH APPROACH AND METHODOLOGY

A. Approach

During the data collection phase, Decision Analyst will employ a two-phased approach to access the current and future Briefing Program environment. This approach consists of:

- On-line surveys completed by *external* customers participating in Executive Briefing events.
- On-line surveys completed by *internal* customers participating in Executive Briefing events.²

The project team uses an on-line methodology. Both internal and external customers are contacted by email to ask for their participation in the research and directed to the comprehensive online survey, which requires approximately 12 to 15 minutes to complete.

When the data collection phase is complete, application of industry expertise by the combined ABPM and Decision Analyst teams will be applied in the analysis of findings and to develop conclusions and recommendations.

B. Independent Research Firm

Since 1996, ABPM has contracted with Decision Analyst, Inc., a leading international marketing research and marketing consulting firm founded in 1978, to conduct the research and process the data. Very highly regarded by sponsors, Decision Analyst subscribes to and fully supports the quality standards set forth by the Council of American Survey Research Organizations (CASRO), the Advertising Research Foundation (ARF), the American Marketing Association (AMA), Marketing Research Association (MRA), the Council for Marketing and Opinion Research (CMOR), the American Association for Public Opinion Research (AAPOR), and the European Society for Opinion Research (ESOMAR).

C. Survey Sample Parameters

A customer/prospect survey sample will be drawn for each company participating in the study. The 2009 study will allow each sponsor to participate at one of four levels for both external and internal customer surveys as shown in the table below. If more than 125 respondents are required, the ABPM will work with the individual sponsors to determine appropriate levels and related pricing.

Number of Customer Surveys ³
50 completed surveys
75 completed surveys
100 completed surveys
125 completed surveys

² The internal customer study will be conducted if there is a minimum of four sponsors. A 10% discount will be applied to the study cost for sponsors who participate in both the external and internal customer studies.

³ Applies to both external and internal customer surveys. Contact the ABPM if your requirements differ.

D. Methodology

Structured questionnaires, designed to elicit quantitative data that meet the defined research objectives, have been developed and are reviewed, prior to the data collection phase, by study sponsors and the project team.

Detailed methodology is outlined below:

- Study sponsors will provide customer lists to Decision Analyst. Format (on an Excel spreadsheet) will be provided to each study sponsor and will include: customer name, date of briefing, center location, and e-mail address.
- Lists: Sponsors should provide as many names as possible, but at a minimum two names from at least three times the number of briefings as desired survey completes. For example, if 50 completed surveys are desired, at least 2 names from 150 briefings (or 300 names) would ideally be submitted. Only one response per briefing will be counted in order not to skew the “contribution to business results” module.
- The ABPM will provide suggested content for an initial e-mail to explain the reason for the research, ask for customers’ participation, provide the URL on which the on-line survey resides, and give your customers the opportunity to opt out of participating. The initial email should come from the sponsor company’s program or project manager. As an alternative, the ABPM will handle distribution of all emails at no additional cost to the study sponsors.
- Following the initial communication, Decision Analyst will manage the name lists, and ABPM will send up to two reminder e-mails, as required, in order to solicit the desired level of participation.

The project team will define, summarize, analyze and explain the data obtained during the data collection process. The 2009 results will be compared and contrasted with the results from the earlier studies. The expertise of the ABPM and Decision Analyst project teams will be applied when drawing conclusions and making recommendations.

IV. PROJECT SCHEDULE AND DELIVERABLES

A. Schedule

The projected time-line is shown below:

DATE	TASK
March 10, 2009	Conference call with sponsors to discuss content of questionnaires.
March 13	Draft of (revised) questionnaires sent to sponsors for approval.
March 20	Questionnaires final.
April 10	All sponsor commitments received by ABPM
Month of April	Sponsors' name lists received by Decision Analyst
As early as April 10 until June 16	Survey process initiated
August 15	Data collection completed
Early October	Reports distributed to sponsors
October 21	Meeting to review the research findings, Dallas, TX

B. Deliverables

Deliverables include the final digital report, content of which will vary, depending on the client's participation level. A hardcopy report will be provided upon request.

- The findings section of the final report is provided in two parts:
 1. The results of the External Customer Survey, unique to the individual sponsor, are compared to the aggregate data — and to previous years' data for that sponsor when applicable.
 2. The results of the Internal Customer Survey, unique to the individual sponsor, are compared to the aggregate data — and to previous years' data for the sponsor when applicable.
- An electronic copy of the presentation of key aggregate findings. Slides may be culled to form the core of a presentation to Program Management and other interested individuals or groups.
- The appendices, in addition to recapping the results of each question in the form of frequency tables, will include any open-ended comments specific to each sponsor's customer surveys.
- An additional optional deliverable will be the meeting to review the research results, which will be held at the 2009 ABPM Fall Workshops. Sponsors of the research will receive a discounted registration for the Fall Workshop series.

- Special requests, other than the deliverables described above, will be accommodated for a modest charge.

V. SPONSORSHIP REQUIREMENTS

A. Overview

Sponsors will have the opportunity to review and approve the draft survey instruments. By project initiation date, each sponsor will provide a list of external and/or internal client names (equal to two names from three times the briefings as the desired number of completed interviews) to be used during the data collection process. We recommend that external customers be given the opportunity to opt in or out of participating on both the immediate feedback forms that they complete at the briefing and in the introductory email sent by sponsors at the time of the study. All documents required by study participants, including list format, can be found on the ABPM’s web site at <http://www.abpm.com/index.php?p=multiclientstudy>.

We recommend that each sponsor participate at the largest sample level possible. As sample size increases, so does the statistical power of the survey and the confidence with which conclusions can be drawn and recommendations made. In addition, a richer set of important and informative qualitative responses will be gathered.

An initial communication from each study sponsor to their internal and external customers will be e-mailed as described in “methodology.”

To participate as a sponsor, please complete and return the attached commitment form either by fax or mail. If required, attach a purchase order or provide the purchase order number on the form. The cost for sponsoring the Multi-Client Study is dependent on the level of participation. Sponsors will be invoiced at the time the project is initiated.

B. Levels of Participation

Levels of participation available to potential sponsors are detailed below: If more than 125 surveys is required, please contact the ABPM.

External Customer Survey		Internal Customer Survey	
Completed Online Surveys	Cost	Completed Online Surveys	Cost
50	US \$6,995	50	US \$4,995
75	US \$9,295	75	US \$7,295
100	US \$11,495	100	US \$9,495
125	US \$13,995	125	US \$11,995

Discount Note:

- In order to encourage participation in the internal customer study, its pricing is lower than that of the external study. An additional 10% discount will be applied to the study price for those sponsors who participate in both the external and internal customer studies.

C. Meeting to Review Research Results

The meeting will take place at the ABPM’s 2009 Fall Workshop series in Dallas and will consist of a review of:

- aggregate customers’ quantified results on customer satisfaction, relationship building, contribution to business results, characteristics of a successful executive briefing, and suggestions for improvement
- selected findings from the *qualitative* data (open-ended responses), which contribute to the understanding of, and add another dimension to, the analysis of quantified results
- a discussion of research trends from the nineteen years over which the study has been conducted
- an update on ways study sponsors have used the research results in the past to quantify and report performance, to obtain approval to implement changes in their programs, and to market the program (as examples)
- An open discussion of best practices sharing

D. Special Requests

Special requests will be accommodated for a modest charge. Specific examples include, *but are not limited to:*

REQUEST	PRICE
The completion of more than 125 external or internal customer interviews	Negotiable
Special cuts of the research data	Negotiable
On-site meeting with your staff and/or management	Travel expenses, if any
Add a unique question (or change a unique question for 2009 sponsors)	\$300.00

VII. QUALIFICATIONS OF THE PROJECT MANAGER

Roxanne McCreery, CMM

Roxanne McCreery has been President of ABPM since 1997. She works exclusively with Executive Briefing Program managers either in her role as the President of the ABPM or on research assignments with ABPM members.

McCreery has over two decades of project management and research experience in marketing communications. The following are among the other research projects she has managed:

- 2004 Staffing Model for Briefing Programs
- 2001, 2003, and 2007 ABPM Compensation Surveys
- Attendee audits for a major trade show producer
- A comprehensive evaluation of the marketing literature used by a Fortune 100 telecommunications firm
- An evaluation of customers' post-event understanding of a revolutionary new groupware product for a major software firm
- Survey of subscribers to determine the preferred format for a users' group newsletter produced by a major telecommunications corporation

In addition, she has directed the research and document production efforts for all annual multi-client studies on *The Role of Executive Briefings* and for more than a decade has performed the analysis of current-year and trend data, including the conclusions and recommendations.

In her role as President of the ABPM, McCreery works closely with Briefing Program Managers and other Briefing professionals to understand their challenges and to provide services that will help them meet those challenges successfully. She defines content for conferences and workshops, based on feedback obtained from ABPM members, and works to foster networking opportunities for Briefing professionals, in accordance with the ABPM's mission.

For the execution of the annual Multi-Client Study on *The Role of Executive Briefings*, McCreery's project team is the independent research firm Decision Analyst, Inc. (refer to page 4 of this document).