



ABPM

PROPOSAL

For the Twenty-Eighth Annual Multi-Client Study on

THE ROLE OF EXECUTIVE BRIEFINGS

2018/2019 Study

Conducted jointly by:

ABPM and Decision Analyst, Inc.

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I. OVERVIEW

A. Introduction

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

The study will be conducted jointly by ABPM and independent research firm Decision Analyst, Inc., with analysis performed by the ABPM. It will build on the success of the previous 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 Programs is dynamic and is increasingly characterized by continuous change, activity and progress. Year-to-year changes may be of small significance, but may 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 better 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 since the last study.
- 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 insightful 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. External Customer Survey

The External Customer Survey will address the following areas:

- Business results quantifying aspects of ROI, including: percent who purchased, influence of the briefing on purchases, percent purchases increased as a result of the briefings (incremental revenue contribution).
- Influence of the Executive Briefing on the length of the purchase cycle.
- Characteristics of a successful Executive Briefing from the perspective of external customers.
- 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' ratings of the effectiveness of Executive Briefings, compared to other methods available to support their purchase process.
- The importance of selected key elements of an Executive Briefing, compared to the level of performance achieved.
- Suggestions by customers on steps briefing programs and their internal partners can take to improve the value of future Executive Briefings.

B. Internal Customer Survey

The 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.
- At what point in the sales cycle Executive Briefings are most frequently used by the internal customer.
- Internal customers' ratings of the effectiveness of Executive Briefings compared to other marketing tools available to support their sales process.
- The internal customers' perceptions 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 Briefing Managers can take to improve the value of future Briefings.

III. RESEARCH APPROACH AND METHODOLOGY

A. Approach

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

- Surveys completed by *external* (end-user) customers participating in Executive Briefings.
- Surveys completed by *internal* customers (sales reps and account managers) participating in Executive Briefings.

Study sponsors may elect to participate in either study or in both.

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 are directed to the comprehensive online survey, which should require approximately 8 to 10 minutes to complete. Edits to the survey may be encouraged in order to assure that the respondent process is not longer than 10 minutes.

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 Decision Analyst, Inc.

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 to process the data. Highly regarded by study 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).

Decision Analyst is GDPR-compliant under the stringent Privacy Shield Framework. Here is an excerpt from their Privacy Policy page:

EU-U.S. Privacy Shield Framework and Swiss-U.S. Privacy Shield Framework Decision Analyst complies with the EU-U.S. Privacy Shield Framework and the Swiss-U.S. Privacy Shield Framework as set forth by the U.S. Department of Commerce regarding the collection, use, and retention of personal information transferred from the European Union and Switzerland to the United States, respectively. Decision Analyst has certified to the Department of Commerce that it adheres to the Privacy Shield Principles of Notice, Choice, Accountability for Onward Transfer, Security, Data Integrity and Purpose Limitation, Access, and Recourse, Enforcement and Liability. If there is any conflict between the terms in the privacy policy and the Privacy Shield Principles, the Privacy Shield Principles shall govern. To learn more about the Privacy Shield program, and to view our certification, please visit <https://www.privacyshield.gov/welcome>

C. Methodology

Structured questionnaires, designed to elicit both quantitative and qualitative 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. Contact roxanne@abpm.com for suggested list formats (fields) and guidelines if needed. For the external study, fields should include: Customer first name, last name, location of briefing (if list includes briefings from more than one location), date of briefing, and email address. For the internal customer study, lists may be as minimal as first name, last name, email address; a center location may also be desired.
- Decision Analyst requires that study participants sign a “compliance agreement” saying that the customers on your list have a reasonable expectation of being contacted. This is to comply with ethics requirements for research firms and will likely align with your own company’s privacy policies. These

policies have almost universally been updated and strengthened in accordance with the new GDPR in 2018.

- To that end, and due to strict privacy policies at most sponsor companies, we strongly recommend that external customers be given the opportunity to opt in or out of participating when they complete their immediate feedback forms at the time of the briefing. Decision Analyst will also provide the opportunity to “opt out” in each invitation that they send during the data collection phase of the research.
- *Optional methodology:* Study sponsors may opt to send email invitations directly if their company’s privacy policy prohibits sharing customer email addresses with a 3rd party research firm. Please contact roxanne@abpm.com to discuss if this is your preferred option.
- *Lists:* Sponsors should provide as many names as possible, as *all responses up to 150 will be included in the data*. The survey is designed to solicit feedback from end-user customers (external customer study) and sales reps or account managers (internal customer study). *Please do not include partners in customer lists.*
- If desired, the ABPM will provide suggested content for e-mail invitations to participate in the research. Decision Analyst will manage the name lists, and will send up to three e-mails, as required, in order to solicit the desired level of participation.
- Data collection will be conducted over the internet via Decision Analyst’s web server. All data on the internet server, and all communications between Decision Analyst’s internal computers and the internet server, will be encrypted at the 40-bit level of security. As the survey progresses, the data will be transferred from the internet server to Decision Analyst’s internal computers, safe behind a protective firewall.

The project team will define, summarize, analyze and explain the data obtained during the data collection process. The results will be compared and contrasted with the results from 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

At the request of our sponsors, this year's study will be conducted in the fall in order to better accommodate respondents who live in Europe. Further, an optional 2nd phase will be conducted, for those sponsors who desire it, in the spring. It is anticipated that the internal customer study will be complete after the fall data collection, and those reports will be distributed in January 2019 (see the first table below). For those sponsors of the external study who would like or need a 2nd phase in order to collect as much data as possible, the schedule for that phase is given in the 2nd table below. The aggregate data for the external customer study, then, will not be available until the summer of 2019, which is when the external customer studies will be published.

DATE	PHASE 1 TASK
14 Aug 2018	Conference call to review questionnaires with sponsor project managers.
27 – 31 Aug ¹	Electronic signatures of List Compliance Agreements due to Decision Analyst
17 – 21 Sept	2018 online Surveys programmed by Decision Analyst
24 Sept	Decision Analyst distributes email templates to sponsors for edits
24 Sept – 5 Oct	Sponsors & ABPM QC and provide final approval of online surveys
28 Sept ²	Sponsors provide email letter edits to ABPM with highlighted changes
5 October	Sponsors provide customer list to Decision Analyst
8 – 12 Oct	Sponsors approve email template
22 Oct	Live review of letter and live survey link (no changes at this point)
29 Oct week	Data collection begins / initial email invitations go out
12 Nov week	Final reminder invitations sent. Data collection ends November 16.
14 Jan week	Distribution of <i>internal</i> customer reports to sponsors

DATE	PHASE 2 TASK
22 April	Sponsors provide customer list to Decision Analyst
6 May week	Data collection begins / initial email invitations go out
20 May week	Final reminder invitations sent. Data collection ends May 25.
15 Jul week	Distribution of <i>external</i> customer reports to sponsors

¹ Electronic signatures of List Compliance Agreements must be received before work can begin.

² Starting point for invitation letters will be the 2017 invitations if available. Sponsors should at the same time provide 2018 contact information, signature blocks, and logos that are required for the invitations.

³ Please do not require conditional coding in the lists; rather hard-code conditions into a separate field or into the letter itself. Also, include on the list the names and email addresses of anyone who should review the survey or project managers who should receive the invitations.

B. Deliverables

Deliverables include the final digital report, content of which will vary, depending on the client's participation level.

- 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.
- The open-ended comments (verbatim) specific to each sponsor's customer surveys.
- An optional deliverable will be the meeting to review the research results, held at the 2019 ABPM Fall Workshops.
- 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. In accordance with the timeline given on page 5, each sponsor will provide a list of external and/or internal client names to be used during the data collection process. It is recommended that external customers be given the opportunity to opt in or out of participating in this research on the immediate feedback forms that they complete at the briefing, in accordance with sponsor company privacy policies. Also, the invitation emails sent at the time of the study will offer an opt-out option.

We recommend that each sponsor provide the largest sample 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.

To participate as a sponsor, please complete and return the attached commitment form either by fax or email, or simply contact Roxanne McCreery: roxanne@abpm.com. If required, attach a purchase order or provide the purchase order number on the form. Sponsors will be invoiced according to their budget timing requirements, but no later than at the time of report distribution for their studies in 2019.

B. Study Cost

The multi-client study will be charged on a by-report, or study, basis. Special requests may incur additional charges to ABPM from Decision Analyst, and these will be passed through to the study sponsor.

- The cost to conduct the research for each study, whether external or internal customer, is \$6,500 per study or report.
- We anticipate that all data collection for the internal study, and for some external studies, will be complete by November 16, at which point the aggregate data results for the internal study will be cut off and fixed for the 2018/19 year. Some, primarily external, study sponsors will require a 2nd phase of data collection in order to obtain the recommended minimum of 50 completes for their research — or as many completed responses as possible. In cases where a second wave of data collection is required, the cost for the additional work will be \$2,400 per study (report).
- If a sponsor requires sufficient additional work such that Decision Analyst assesses additional fees to ABPM, ABPM will request that the sponsor of the to-be-charged amount cover those charges (typically these are modest).

C. Meeting to Review Research Results

The meeting will take place at the ABPM's 2019 Fall Workshop series. It 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
- 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 with best practices sharing

VI. PROJECT MANAGEMENT TEAM

Roxanne McCreery

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 and marketing communications.

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 two decades has performed the analysis of current-year and trend data, including the conclusions and recommendations.

Elizabeth Simpson

Elizabeth Simpson has been with the ABPM since 2000, when she joined as Director of Membership Services.

In her current role as COO of the ABPM, Simpson works closely with Briefing 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.

Decision Analyst, Inc.

For the execution of the annual Multi-Client Study on *The Role of Executive Briefings*, the ABPM's project team is the independent research firm Decision Analyst, Inc. (refer to page 3 of this document).