

Using Your Website to Gather Customer Intelligence

Jeanne L. Allert, M.Ed., President, Ellipsis Partners
and
Steve Victor, Associate Director for Education,
Association of Yale Alumni





Defining Your Market Research Agenda

- Are you serving the audience you intend?
- Are you aligning your attention and resources appropriately?
- Where are resources being wasted?
- Who's "doing it better" than you are?
- Are your web efforts comparable to similar organizations?
- How can we make money on the Web?
- What new products/services/information should we consider?
- "If we build it, will they come?" feasibility assessment
- In what ways can you deepen customer affinity, increase value, stimulate activity?
- Measure content effectiveness and determine content/functionality is inconsequential to visitors
- Are there opportunities to trim back or add to current content/ features/ functions?
- Measure usability and navigation effectiveness
- Determine the factors that influence satisfaction and purchase success

What are your research objectives?



Types of Business Intelligence

- Contextual
 - How does your website compare/compete in the Internet Universe
- Statistical
 - What are the traffic numbers and what can they tell you?
 - Who is coming to the site?
- Demonstrated
 - How do visitors actually use the site?
- Articulated
 - What do our customers say about their Web experience?
 - How does this impact our business/sales?
 - What more can we do to "surprise and delight" our customers?

Comparative Scan

Using the Web for Ideas and Intelligence

- Contrary or supportive positions
- Novel ideas/approaches
- Design ideas
- Plug-in applications
- Partnership /Sponsorship potential
- Reciprocal linking or content potential
- Who's encroaching on your market?

Comparative Scan

How can you find it?

Include in your Comparative Scan, websites that...

- Serve your same audience, mission, goals
- Are in complimentary industries or markets
- Offer similar or competing products/services
- Your visitors also visit often

Coming up with the List:

- Generated from a question on your market survey
- Search on terms used to find YOUR site
- Top Referring Sites
- Check Google/Yahoo! Directories

Evaluating these Sites:

- Use a standardized matrix of evaluation criteria
- Grab links of interest

Comparative Scan

What are the implications of what you find?

- Specific enhancement ideas
- Accelerate your web efforts
- Identify applications you can build, buy, or customize
- Identify and promote your unique offerings
- Learn news ways you need to compete



Usability Testing

- Card Sorting for Navigation/Label input
- Scavenger Hunt for assessing “User paths”
- Structured script to examine obstacles
- Guided instructions for the testing exercise
- Help to ensure testing consistency



Task	Relevance	Ease of Use	How much time did you spend on this task?				Your comments on state of task
			Start	End	Time	Notes	
1. Locate the "About" button on the home page							
2. Make a purchase: "Buy Blue Book"							
3. Find answers to common questions: a question about your membership							
4. Find a listing for a job opening for a field professional in New England							
5. Update the member directory and find contact information for the member: "Helen K. Smith"							
6. Update the member profile: "Helen K. Smith" and change the member's contact information for the member: "Helen K. Smith"							

Audience

What data are you looking for?

- Can you clearly define market segments?
- Identify/confirm multiple audience groups
- Patterns and preferences of site use
- Reactions to/evaluation of current web offerings
- Identify/confirm optimal visitor behaviors
- Do you have all the information and tools needed to provide visitors with a positive experience?
- Ideas for enhancements

Audience

How can you find it?



Site Feedback Form

- Lives continuously on site
- Captures at point-of-service
- Lacks a sense of urgency
- Easy to create and maintain



Intra-Site Polling

- Not statistically significant
- Limit to 1-3 questions
- Offer polls within context – catch them at the moment of engagement
- Develop a polling agenda/calendar, coincide with other “events”

Focus Groups



- Best for:
 - ✓ Deriving information about values, opinions, explanations
 - ✓ Identifying and clarifying problems
 - ✓ Finding the best solution to a problem
 - ✓ Assessing reaction to a concept or service
- Particularly for design or usability studies
- Use visual aids to illustrate web concepts and stimulate discussion
- Consider a web-based focus group, especially to get reactions to design comps

Thank you!

Jeanne L. Allert
Ellipsis Partners
jallert@ellipsispartners.com

Steve Victor
Association of Yale Alumni
steve.victor@yale.edu
