

# Job Aid



## Customer Data Research Tools

**Purpose:** Use this job aid as a reference to the various customer data research tools.

### Tools for Collecting Customer Data

Tool	Characteristics	When to use it	Levels of evaluation covered	Strengths	Weaknesses
<b>Customer service databases</b>	A repository of customer service data	To get information on product or service sales, returns, or refunds or data on sales preferences, customer referrals, closure rates of sales calls, and DSO	Knowledge	Provides specific, objective information about sales and customer service	Doesn't take into account customer attitudes, opinions, or observed behaviors
<b>Interviews</b>	In-person, one-on-one questioning of individuals	For more in-depth understanding than analysis of database information can provide  For developing new insights and pursuing new lines of questioning as they develop	Knowledge, Attitude, Opinion	Allows for greater interaction, visual cues, more complex questions and in-depth discussion	Labor intensive and expensive per interview  May require significant effort to reach all needed respondents  Interviewer may introduce bias
<b>Focus groups</b>	Small groups (usually fewer than 10 people) discuss a specific topic	To measure reactions to concepts, key features of a product, new packaging, or advertising	Attitude, Opinion	Provides useful information about people's attitudes  Ensures greater	Can be costly and resource intensive, requiring facilitators and venues, and participants may need to be paid

		<p>To assess effectiveness of advertising</p> <p>To generate ideas for new products and services</p> <p>To provide evidence for claims about products</p>		<p>involvement because focus groups are small and specifically tasked with testing ideas and gaining opinions</p>	<p>May be considered less valid because the opinions or reactions are collected from such a small sample</p>
<b>Surveys</b>	<p>Data is collected from a sample of a population, typically using questionnaires, and then inferences are made about the population as a whole</p>	<p>To get quantifiable and statistically reliable data on a large population</p> <p>To confirm theories or information you've developed using other tools</p>	<p>Knowledge, Attitude, Opinion</p>	<p>Can be in-depth enough to allow the data to be assessed in a variety of ways</p> <p>Can be used on large populations, increasing the chances that a wider range of respondents can be assessed</p>	<p>Require considerable time and effort to plan and execute</p> <p>Prone to scope creep, becoming unwieldy and uninformative</p> <p>Poor planning and badly targeted questions can render less useful results</p>
<b>Observation</b>	<p>Watching customer behavior -- one of the most reliable methods to understand customers</p>	<p>To observe the effectiveness of customer feedback methods such as complaint hotlines or website functionality</p>	<p>Behavior</p>	<p>Can help focus efforts on what customers really need</p> <p>Can be used with a small number of respondents</p>	<p>One-to-one basis makes it time-consuming</p>

		To evaluate any customer-facing staff such as service or sales specialists or accounts receivable staff		Can identify where customers have problems	
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**Course:** Processes and Customer Analysis in Six Sigma Projects

**Topic:** Collecting Customer Data

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