

'Can you open 24 hours a day?'

'Delighted this facility is on our doorstep – very lucky'

'I love this place, I don't know what I would do without it'

Of course, some people don't like children and young people in the building, but there are plenty of other places for them to go, I suppose, and I think that's a cultural thing we have to keep trying to tackle.

'Since re-opening in October the macrobert has established itself as the premier children's arts venue not only in Central Scotland but anywhere in the country'
(Mark Brown, *The Scotsman*)

'Children and young people are not just the audiences of tomorrow. They are audiences now, in their own right. And they have talents and potential, which must see the light of day.... There are people in Scotland now who have that vision - like the macrobert in Stirling' (Rt. Hon. Jack McConnell MSP, St Andrews Day Lecture, 30th November 2003)

Three years on, I think we've learned that we are still at the beginning of our journey but that young people in particular are a powerhouse of ideas and inspiration; that young people are the audiences of now, not only in future; that family audiences can generate additional income and that adults and young people can co-exist in the same building. We've just conducted a lot of research and identified some challenges that we face, particularly with non-attenders who have the perception that macrobert is only for children and young people, so that is our next challenge - to develop a marketing strategy to ensure that we are seen as what we are intended to be, an arts centre that is genuinely inclusive for all ages.

Putting Passion and Purpose on your Life Map

Jackee Holder, Life Work in Progress

The two things that often prevent us from achieving our goals are resistance (stopping ourselves from doing the things we want to do) and taking action (actually putting into practice the things that will get us closer to where we want to be).

One of the things I want to focus on is what nurtures and nourishes us as individuals. What will help us put our purpose back in a central place on our life maps? I think most of us will, when we think about our lives, find that often it is very busy, with a lot on the schedule.

When I talk about purpose, I mean it in the smallest of senses, in terms of how you feel about who you are being in the world and the impact you are having, and big purpose, in terms of making an impact with things you create or believe in or projects you get behind or lead - so purpose in all its forms and guises. I'm sure many of you have small purpose that is just as significant and meaningful and you also have a vision of a larger purpose – maybe something you've always wanted to do or new projects or ideas that you'd like to achieve.

The way we sometimes get back on track is by taking quality time out and the aim of the workshop is to show that this doesn't necessarily involve lots of time. It includes exercises that you can take away and do on your own that will encourage you in terms of making sure your purpose is central and you are not getting distracted. This also means we need to bring some consistency to the way in which you review and evaluate your life. We're going to be utilising some very simple questions but they have profound effects.

Thinking about the branding keynotes, part of your purpose is all about branding yourself – this is who I am; this is what I'm about; this is what I care about; these are the services, skills and talents that I have to offer – and then finding a form to offer it in.

Think of an area of your life that you would like more passion in, or an area of your life in which you would like to be clearer about your purpose or the thing that motivated you to come here. Some examples are:

- Carving out time for personal creativity;
- Motivation;
- Trying to slow down and simplify life;
- Being more organised;
- Being able to identify your strengths;
- Being able to identify new directions;
- Actually do things I always thought I would do or have done by now;
- Being able to identify what you really want to do – sometimes you're faced with so many choices;
- Stop comparing yourself to other people;
- Being brave enough to give up the things that you know don't make you happy.

In relation to the last point, can I suggest that you make a list of things that you don't want to do. On that list might be activities that you do but that don't inspire or motivate you. One of the things we want to think about while seeking out our purpose is, when we've identified what we want, about clearing the way to make it happen. We need to work out what we need to do less of and eliminate from our lives in order to make space – physical, mental or emotional – for the things that we want to focus our energy and attention on. Sometimes there are so many things draining our energy and time, we need to carve out time for personal creativity, to be able to slow down and simplify. So one thought is: what might you need to let go of in your life so you can have some of the other things that you want?

Stop comparing yourself to people: if we think about resistance, comparison robs you of your passion, enthusiasm and motivation. Like with running – you may have been running for 45 minutes but the minute somebody passes you it's no longer about how long you've been out there or what you are achieving for yourself; immediately your energy and attention goes on the other person, robbing you of your achievement and the progress that you are making in that present moment.

Wheel of Life

If you have done it before, take time to compare how the last one looked with a new one. For those that haven't done it before, draw a circle on a blank sheet of paper and divide it into eight equal sections. The aim is to help see where you are at – it is a quick review process. Sometimes in workshops the sections are pre-defined e.g. work; home & family; health & fitness; relationships; travel; spirituality; money and free time. But you should come up with the eight most important areas of your life and place each one in a different section. These are not necessarily all things that you want to change, but the eight areas that matter to you most in your life.

Once you have done that, start from the centre and put little lines to use as a scale in terms of how you are feeling about a particular area. So, if we start from the centre, imagine that is 0 and then have a grade of 10 little lines going out equally to the outer edge of the circle (which is 10). Now go round each of the areas, think about how you feel about them right now and then put a cross there, 10 being good. If there is something lacking in an area then it won't score 10. This is a good way to get in touch with how you are feeling about your life. When finished, join the crosses up and take a few minutes to go round and in each of the areas, is there anything you would like more of and is there anything you would like less of? So e.g. in your work life you might want more opportunity to express your creativity in your work or less time spent at work. Also ask yourself, what would you like to stay the same – it is important to look at what is good and working, as well as looking at

what you might want to change or let go of.

Think also about the shape of your life wheel - what is that saying to you about your life right now? This gives a visual picture of how your life is and what you might want to shift or change about it. Once you start deciding on the particular areas you want to focus on and invest more time, energy and focus in, then you are doing the work on it.

You might also have to prioritise: for example, you might like to have more money but if you would also like less time at work already then you might need to decide which area you are going to give your attention to. I should also add that sometimes 10 might be an ideal, so we might just be talking about aiming towards a 7 or an 8.

If I said to you on a scale of 0-10, now that you have done your wheel of life and you are thinking about what you really want, where are you on that scale in relation to your overall purpose, what would you say? 5? 8? Get an idea of where you are in relation to where your life is right now, because you need to acknowledge where you are, before you can get clarity about how you might go about getting to where you want to be.

There are some realities in life but often we find that before a step has even been taken we create a whole set of objections about why we can't achieve our goals and this zaps our motivations rather than focusing on the positives that will energise and motivate us. We also need to focus on the things that get in the way – so while the objective may be to move house, it may be the money and relationships that are the resisting areas that we need to focus the energy and attention on.

Q: I have a time deficit - everything I want more of involves more time – for friends, family, boyfriend – where do I get it all from?

Consider the following from the *One Minute Manager*.

1. Things you have to and want to do	2. Things you have to and don't want to do
3. Things you want to do and don't have to do	4. Things you don't have to do and don't want to do

So anything that takes time goes into a box. Think about your own prioritisation and the things you do the most – some people do 1, some 2 some 3. The benefit of prioritising box 2 is that you get it out of the way, clear space and get things done. But most prioritise 1 and 3. With 3, you are spending energy on things that don't have to be done and putting things off that need to be done. This takes extra mental, emotional and physical time. With box 2 you need to find the positives e.g. doing the washing means you can wear a particular outfit when you go out, or give yourself a reward when you do the things in box 2. Sometimes we just need a small incentive to get us there. How can we motivate ourselves to get these things done? Ultimately, then, how we manage box 2 is most important.

The things that you have to do but don't want to do (and so don't do) are known as tolerations. Tolerations are anything that drain your energy. Often when we feel demotivated or unenthusiastic, we need to go back and clear some of the tolerations in our lives, to clear space to give us time to focus on our ideas. Tolerations that might drain your physical, mental and emotional energy include:

- Housework;
- Piles of unopened bills;
- Being a family organiser;
- People you live with;
- Owning a house – sorting out work that needs doing.

So to put some perspective on tolerations: we are headed towards shifting your energy. The purpose of tolerations is to be clear about what is draining your energy and eliminate or reduce it.

2. Things you have to and don't want to do

1. Things you have to and want to do

4. Things you don't have to do and don't want to do

3. Things you want to do and don't have to do

I Will Not Die an Unlived Life, by Dawna Markova, is all about her life journey dealing with breast cancer and talks about four questions. They are very simple but help point you to what really matters:

L – What do I **Love**? What inspires you, what motivates you and what do you really want?

I – What are your **Inner** gifts and talents? Write down the things you are good at, that other people know you for and admire in you. This is partly about acknowledging and affirming what you already have, but also about identifying any gaps in which you might need to develop your skills, knowledge or experience.

V – What do you **Value**? What's important to you? Your values are key to your purpose.

E – What **Environments** bring out the best in you? When thinking about this question, think outside the box. It might be about workshops or solitude, books or radio – the mediums in which you can express your purpose. It can come down to the most basic thing about the kind of physical space that will inspire you, motivate you and energise you.

D – **Doing**. I would add a fifth element, which is about identifying and committing to the action that needs to be taken.

Further reading

I Will Not Die an Unlived Life by Dawna Markova

Callings by Greg Levoy

How to Be Inspired by Nick Williams

The Work You Were Born To Do By Nick Williams

I Could Do Anything If Only I Knew What It Was by Barbara Sher

The War of Art by Steven Pressfield

The Creative Habit by Twyla Tharp

The Right Questions and the Best Year Yet by Debbie Ford

90 Days To A New Life Direction and Living Your Best Life by Laura Berman Fortgang

Take Time For Your Life by Cheryl Richardson.

The E Myth Revisited by Michael Gerber

Transform Your Life by Penny Ferguson

What Should I Do With My Life by Po Bronson

The Tipping Point by Malcolm Gladwell

What We Ache For by Oriah Mountain Dreamer

Crossing the Unknown Sea – Work And The Shaping Of Identity by David Whyte

Make Your Creative Dreams Real by SARK

Soul Purpose by Jackee Holder

Conducting Primary Research: everything you need to know to get it right first time

Jo Litt, Royal Shakespeare Company

This will be a presentation aimed at first timers to the subject of primary research – a summary of how to conduct in-house research projects, rather than the considerations you would need to make if you were commissioning some research from a third party. In other words, what will be covered today are the research methods for relatively small-scale projects. The format will be a broad overview for the first 45 minutes of the session, followed by questions at the end.

There will be no stats or charts in this presentation. Firstly, to summarise what the session will cover: it will start with a broad overview of data collection methods, and will then outline how you go about conducting primary research. This includes planning the research you hope to carry out, designing the questionnaire, analysing the results and reporting your findings. At the end of the presentation is a discussion of the ten crucial Dos and Don'ts of primary research.

To begin with, it is important to explain briefly some market research jargon. 'Primary research' is essentially any research you carry out in order to get new data. 'Secondary research' is research or data that already exists, so research that has been carried out in the past by someone else. 'Quantitative research' is any number questions, yes/no questions, details about, for example, age, and closed questions, while 'qualitative research' means questions concerning feelings and opinions – so open-ended questions.

Secondary data can provide very useful background information that you can use to back up or to contextualise your own primary research. Useful information sources you might use or come across include the Arts Council, TGI data, census data, the Office of National Statistics, your ticketing database, and the Marketing Pocket Book. This last publication provides details of the population from the ONS, allowing you to find out, for example, the percentage of under-25s in your area.

The data collection methods most readily available to you will probably be questionnaires, focus groups and accompanied theatre trips. Questionnaires can be carried out face to face, or sent (or returned) by post to your database contacts; they might be emailed out, or filled in online on your website, or might be carried out over the telephone, which involves useful interaction with your audience. Focus groups can be an interesting way of mixing up different kinds of people to generate good discussions about your venue. However, you need to be careful not to let focus groups get out of hand – they can sometimes produce huge amounts of fascinating but completely unusable information. Finally, you might choose to accompany a patron to one of your performances. This can be an interesting way of seeing how your building appears to someone who doesn't know it. When you work in a place all day, every day, you stop noticing things that someone visiting the building for the first time might have problems with. Accompanying someone on their visit might show you, for example, that the toilets are not clearly signalled from the foyer, or that certain ticket prices are particularly appealing for reasons you hadn't considered – or that the car park lights are never on at the end of a late show, and so on.

When beginning to go about a research project, the first crucial question to ask yourself is 'why am I doing the research?' Outlining your project objectives, defining what it is you want to achieve, is fundamental. You must decide what it is that you want to know, what decision you want to drive, what action you want to come out of it, and who you should be surveying. These objectives should follow the SMART model: they should be Specific, Measurable, Achievable, Relevant and Time-based – you need to set out initially the timescale for the work you are planning.

You also need to ask yourself how you will go about compiling the questionnaire: how will it

be distributed? What tools will you use to analyse the data you receive? How will you use the data when you have it? Who in your organisation will be responsible for physically carrying out the work involved? And find out what extra support is available to help you in gathering information.

In asking yourself what it is you want to know, there are three main areas of research for an arts-based project. Firstly, you might want to collect feedback about your venue, for example the level of service perceived by patrons. This might include journey time to the venue, car park safety issues and so on. Secondly, you can collect information to inform specific policy changes your venue might be considering. Bear in mind it can be difficult to change something noticeable in the building without taking into account the opinions of your audience. If, for example, you want to change smoking policy to make the foyer a non-smoking area, you can canvass audience opinion and then present the results. Suppose 70 per cent of respondents say they would prefer a non-smoking foyer, then you can make the change and display the results so that if you meet any complaints, you can say 'this is what 70 per cent of you asked for', demonstrating commitment to audience opinion (even if you were planning to make it non-smoking regardless what they said – they don't need to know that!). The third main research area to look into is the collection of demographic information, for example the postcode of the respondent. You can use this information to measure for accuracy against postcode data in your database, bearing in mind that people that answer questionnaires are often specific groups – women over 55 have a tendency to answer questionnaires more than the average, as do singles (it gives them something to do in the interval).

On the question of who you should be surveying, it is important to be realistic! You will not be able to survey all the people who visit your venue, it's simply not possible. The 2000 market research project at the Queen's Theatre, Hornchurch, surveyed only those people who were loyal customers, and came to in-house productions. It's also important to consider when you will have the time to process the information – at the Queen's, data was collected in the spring to leave time to get the analysis done. So: break down your audience into sectors before you begin surveying, for example those people who are professional theatre goers, those who come only for guest concerts or music, the family audience, the amateur hire audience and so on. In 2003, the research at the Queen's was widened to include guest show and children's show audiences. The children's show audience had a very low response rate – obvious, in retrospect: mothers managing kids in the interval have enough on their hands without having to fill in a questionnaire as well! Interestingly, the amateur hire audience felt considerably more positive about the venue than the professional theatre-goers. However, it's important to remember that some sectors of the audience are worth more than others – for example, you may sell eight tickets a year to each of your professional theatre-goers, so their opinions should be acted upon more than the sectors who only attend as one-offs.

When compiling a questionnaire, you first need to work out everything you want to know! Bear in mind everyone in your organisation will want to know something different, so ask around. Make sure you use secondary data to work out what information you already have – don't ask what you can find out elsewhere. For example, you should know how much they spend from your ticketing database, which you should use extensively to source your statistics. Avoid asking questions if you will not be able to use the results. An example of this was in the 2000 survey carried out at Queen's. That included a question regarding a future project that then never happened, and with hindsight the question should have been excluded. Finally, revisit your list of questions and delete any questions that can be answered by secondary data, irrelevant information and ticketing information. You will, in all probability, still have a sizeable list.

Planning wording and question order is an important consideration: you must be empathetic to your audience. Everyone has seen questionnaires they wouldn't fill out – tiny font size, lengthy forms, jargon-dense prose, questionnaires that ask you your age straight off. A useful test is to run a pilot with your non-marketing staff – get someone to read it through to check that the order of questions makes logical sense to someone else. At the Queen's the Box Office staff were asked to fill in the questionnaire as a test, and provided a lot of useful feedback on jargon, which, if you use it every day, you wouldn't notice. Keep your questionnaire as short as possible, no longer than ten minutes to complete – at Queen's,

again, the form was a sheet of A4 divided into four panels. People look at a single sheet of paper and think 'I can do that' – in addition, a single sheet will keep your photocopying costs down! Move all your personal questions (age, sex, postcode etc.) to the end, as putting them at the beginning puts people off. By the end, people are so used to answering questions that they rattle them off without thinking. Finally, keep your questions unbiased. For instance, asking 'What did you find particularly helpful about our brochure?' supposes that there was something helpful about it. Make sure you allow your respondents to answer as honestly and factually as possible, rather than leading their answers.

Think carefully how best to distribute your questionnaire to maximise response rate.

Possible distribution methods include:

- Face-to-face question-answer in the foyer;
- Posting slips to e.g. 'top 500' customers;
- Leaving slips on seats in the auditorium;
- Phoning or emailing customers;
- Publishing the survey on a website.

Bear in mind that your methodology will affect your response rate. At the DTI, some research was carried out on research, so to speak. At one conference, delegates were mailed afterwards with a questionnaire to post back, producing a 5 per cent response rate. At a second conference, the questionnaire was included in the delegate pack, with instructions to post it back, also producing a 5 per cent response rate. At a third conference, a prize draw was announced to take place at the end of the day for all those who had filled in their questionnaire, and repeated reminders of this were put out throughout the day. The response rate there was 60 per cent.

In a theatre context, at Queen's one questionnaire was distributed to patrons to fill out before the performance started, to collect feedback about the front of house experience. Clearly marked boxes were also provided in the foyer to put the completed forms in, and the usherettes were tasked to remind people to fill them in. In addition, a prize draw was offered for entrants at the end of the show. A helpful hint is to provide plenty of pens and tables. That way, when someone refuses to fill in the form, with the excuse of 'I can't, there's nowhere to lean' or 'I don't have a pen', you can point him or her to a table, or provide a pen. This actually produces a guilty feeling in a lot of people, so they then go on to fill out the questionnaire. Bear in mind as well that a surprisingly large number of people actually *like* talking to staff, and feeling that their opinions are taken on board and valued. People like to feel that their responses have made a difference to, for example, the smoking policy mentioned earlier, so ensure that you put up signs afterwards detailing some of the results. This really does produce a positive response from patrons, who like to feel they are making a difference.

A couple more statistics: in the 2003 survey at Queen's, questionnaires were placed on seats in the auditorium. The response from these was approximately 5 per cent. The response from questionnaires handed out in person was around 55 per cent. If you are trying to benchmark your response rate, the average variation in paper questionnaire response rates is between 12 per cent and 70 per cent.

Once you have collected all of this information, the important thing is to analyse it. A surprisingly large number of organisations get to this point and then stop. Be sure to have planned your time so that you will be able to process and analyse the data – data inputting makes a great job for work experience people. You can get software packages to take you through the inputting process, for example the one used at Queen's [Snap] provides an inputting interface that looks just like the questionnaire. Software packages can be expensive at around £1,000 to £2,000 a time, but are a good investment, particularly given that you should always carry out a follow-up piece of research. The second piece of research should ask different questions, having learnt from the first piece. If you're able to, try and get on an advanced Excel training course to help you with data analysis. Excel allows you to use pivot tables for cross-tabulation – if you get on a training course, tell the trainer what it is that you want to learn. In processing data, bear in mind that it is important

to keep all of your individual responses as separate entries – this will allow you to group them in different ways when you are analysing the results.

In drawing out the results, try to focus on getting the broad answers out of it first. At the Queen's theatre approximately 1,500 forms came back, and first of all the broad issues were examined, for example whether the service was perceived overall as good or bad, the number of responses and so on. Everyone works on gut feelings in the industry, and these broad perspectives will help you with your gut feelings. From there, you can then revisit the questions in more depth, in order to build a more detailed picture of your audience. You can use data analysis tools to cross-tabulate the responses, which will give you deeper knowledge of your respondents.

The next question, once you have analysed your data, is deciding what to do with it. Publish a summary document, approximately two pages relating all the key information gathered. The more useful information you can get into it, the more helpful it will be. Report the facts with clear conclusions and don't get emotional: for example, if your responses show that Tuesday night is a very unpopular night for the bar, and you happen to know Bill Smith works the Tuesday night shift, don't jump to conclusions! Discuss the results and follow them up with a set of action points; so if they show an under-representative proportion of the 16-24 age group attends your shows, do something specific to redress this. Present the report as widely as possible, and keep it objective and honest – if you get 'bad' results, these can be as useful to build upon as 'good' feedback. Don't be too scientific – if a significant proportion of your responses indicate a particular criticism, you can act upon it without excessive scientific justification. People reading your report will like to see simple, clear graphics such as pie charts – you don't need to go into detailed methods to justify and validate your data. Finally, back up your primary data with secondary data wherever possible.

There is one further issue to cover before summing up – namely, who is responsible for carrying out the work? Essentially, the answer is you. This involves handing out questionnaires, persuading the usherettes to collect them, providing the usherettes with the information they need to hand out forms and answer questions if necessary and so on. You can use areas you wouldn't necessarily think of to support you in some of these tasks, for example youth groups are often happy to get involved, final year students looking for a project may be very interested in data gathering for you. Draw on all the extra support you can, especially work experience children, and research software packages so you are able to present a game-plan to potential funders to secure yourself software training and so on.

Top 10 dos of market research

- Ask lots of quantitative questions
- Make the questionnaire quick and easy to complete
- Add space for further comments and make use of open-ended questions – people like to give feedback, particularly on questions such as 'If you could change one thing about this venue, what would it be?'. Look for keywords in answers from these sorts of questions, for example at the Queen's it was the carpets, at Bromley the stairs. The process of filling out the form will have made little things creep into their minds, so provide space for them to express them.
- Add an incentive to complete the form, e.g. a family pantomime ticket. This can be a tiny incentive, but makes a huge difference to response rate.
- Keep the questionnaire short
- Hand questionnaire to patrons face to face – this gives them the chance to make real contact.
- Provide pens, tables etc. for ease of completion
- Analyse your data
- Publish results widely – you have done your project for a reason, so make sure you publish the results, even if they are bad, as it gives you something to

improve on. In addition, publish some results where respondents will be able to see them. Also publish results for the benefit of the team involved; for example, usherettes otherwise see no feedback on how their input has affected the project, so will be pleased to be included in the presentation of findings.

- Learn and adapt the format or the questions for next time. At Queen's, the second survey, with its questions informed by results from the first one, had far more positive responses.
- Always use an even number of tick boxes if you are asking for a response graded e.g. very good/reasonable/below expectation/dreadful, otherwise responses will automatically gravitate to the middle box.

Top 10 don'ts of market research

- Don't ask lots of qualitative questions on a 'paper' questionnaire. People won't want to give so much detail as this on paper; use a focus group for this sort of thing instead.
- Don't make the questionnaire complex or unclear – put yourself in the respondent's shoes!
- Don't ask personal questions at the start of the survey, as this puts people off. Remember to refer to data protection guidance here too; otherwise you won't be able to use your data.
- Don't try to sell something – the aim of the exercise is to obtain data, not income. The Marketing Research Society has very clear rules about what you can and can't say in a survey.
- Don't use jargon in your questions.
- Don't ask questions when you won't be able to use the data.
- Don't ask for information you can gather from other sources, unless it is to check for validity (e.g. a fair representation of your customer base)
- Don't get hung up on statistics when analysing: the clearer and more simple it is, the more people will believe it.
- Don't do a 'one-off' project with no follow-up
- Don't believe everything the patron says. Read everything with a pinch of salt and don't start thinking you're wonderful just because the survey says so.

Useful websites

- www.neighbourhood.statistics.gov.uk
- www.marketresearch.org.uk
- www.artscouncil.org.uk
- www.statistics.gov.uk
- www.ntc.co.uk (Marketing Pocketbook) – actually a print publication, but you can buy it online

Questions

Q. What is the shelf-life of this sort of research?

A. That depends, but really you need to think about re-running research every 2 years or so.

Q. Can you say something about touring companies carrying out research and the importance of the relationship between the touring company and the venue in such a case?

A. Communication is very important here. At the Queen's theatre, a touring dance company was carrying out a survey of its audience but hadn't given the venue enough warning, nor enough training to the usherettes. In addition, they didn't always provide an address to send the forms back to! Finally, they didn't provide any feedback to the venue about the results, though I think this would have been very helpful and appreciated. So it can work, but you need to establish good communications between the company and the venue.

Q. We've had a lot of questionnaires back that have been very bitty and only partially filled out. Do you have any advice about this?

A. If it's always the same questions that are not getting answered, they are probably either unclearly phrased or too personal, or not the sort of information people want to provide. Otherwise, I would also recommend that you check your questionnaire isn't too long, and think about adding more tick-box questions.

Q. What constitutes a reasonable number of responses?

A. Anything over 5 per cent is usually workable. Anything under this is not necessarily analysable, but still it can be useful to read it.

Q. To what extent does market research feedback affect a marketing strategy?

A. It affects it all of the time. One piece of research we carried out provided the frequent response that we should advertise every week in a particular newspaper. We already did – so we stopped.

Q. You mentioned earlier that some groups of people fill out market research questionnaires more frequently than others. Is there any way to balance this out?

A. Use focus groups for a wider perspective. Also try to find ways of encouraging under-represented groups.

How to Build a Customer Relationship Management (CRM) Strategy

Katy Raines, DixonRaines

What is CRM?

CRM has three main characteristics:

- Time: it involves a long-term, rather than a short term, perspective and develops relationships with customers over time;
- Retention/Loyalty: a focus on keeping customers rather than just finding them;
- Dialogue: CRM involves a two-way relationship, a shift away from one-off sales 'exchanges' or 'transactions' with the customer to ongoing relationships.

CRM may be further characterised by comparing Transactional Marketing to the Relationship Marketing/CRM approach:

Transaction Marketing	Relationship Marketing
Focus on single sale	Focus on customer retention
Orientation on product features	Orientation on product benefits
Short time-scale	Long time-scale
Little emphasis on customer service	High customer service emphasis