

CASE STUDY: THE ALL IMPORTANT BALLOT DESIGNATION

Officially it's called the candidate's "Designation of Title." Consultants and their clients tear out a lot of hair deciding which words appear next to the candidate's name. Split sample tests in survey usually show small differences in voter support between reasonable alternative designations. In Carlsbad, California, Councilmen Matt Hall, managed by **Janette Littler of CALLIDUS Consulting Group, Inc.**, and Keith Blackburn, managed by **Mary Azevedo of Mary Z**, squared off to replace the retiring incumbent. CERC's July poll showed Hall had slightly better name recognition and was viewed more favorably than Blackburn, but the latter had a comfortable 8% lead in the head-to-head ballot test. Huh? Their ballot designations were the difference: Blackburn was labeled in the head-to-head as a Councilman/former police officer; Hall was tested as Councilman/businessman. But it turned out that Blackburn would be unable to leverage his public safety past on the ballot because rules disallow a candidate from using a designation based on employment that occurred more than a year earlier. Fast-forward to mid-September when, despite little campaigning but the actual ballot titles now in place, a fresh poll showed Hall with a 7% lead! By not differentiating himself from Hall, Blackburn lost his competitive advantage and ultimately lost the race by 7%.

Lesson: Ballot designation (also wording, language, etc.) can matter. . . a lot.

Spring 2011

Those who Stand Still get Run Over

A challenge for any business is knowing when to upgrade to new technology. The stakes are high when something comes along that might be the wave of the future or merely a fad. Wait too long on what turns out to be the "real deal" and the firm becomes irrelevant. Jump on something that flops and time, effort and money are wasted. Competitive Edge constantly scans the horizon for new techniques and technological solutions, conducting tests on the most promising ones. When those technologies prove themselves, we invest heavily in them. This issue details how our recent investment helps clients retain their edge.

Speaking of innovations, you can now follow CERC on [twitter](#) at **competitivedge**.

In the last issue of *The Edge* we opined that "more than 60% of the people" contacted for robopolls hang-up. It turns out that our most recent experiment shows that number is a little low. See what we found inside.

Qualitative research is a large part of what we do. We're proud to announce that CERC's focus group database has surpassed 7,000 pre-screened participants. While size matters, quality does too. Because the vast majority of those in CERC's database were randomly selected, we avoid the "professional participant" problem which plagues typical facilities.

CERC Bulks Up; Adds to Capabilities

Competitive Edge has invested heavily in technology over the years. There is no stopping now. CERC has upgraded its entire interviewing system to the VOXCO Command Center, installing more than \$100,000 in the latest software and new equipment to meet the emerging challenges in the worlds of survey research, grassroots campaigning and voter contact.

VOXCO's Command Center is powerful *and* elegant. Telephone, web, face-to-face, mobile, and even IVR projects can all be managed through one complete and intuitive management platform - everything from scripting to reporting. It seamlessly integrates every data point from every collection mode to increase accuracy and project efficiency.

For survey research, CERC's new capabilities allow us to maximize response rates through sophisticated call back rules and sample management modules. Also, as part of the platform, telephone surveys are seamlessly integrated with other collection modes so that projects can begin with a phone interview and be completed over the web with no data merging required. Another added feature allows for radio spots to be played for respondents to test their effectiveness.

How about qualitative research? CERC can now host on-line focus groups and in-depth interviews. This opens up a whole world of innovative and multi-media-rich techniques like collaging, using bulletin boards to gather data, on-line ethnography and spot testing. When paired with CERC's participant database (see article below), clients have a truly awesome amount of research power at their disposal.

When it comes to grassroots programs, the new system allows for quick and personal communication. For instance, an activist recruited by CERC over the phone can now immediately receive an e-mail with links to targeted legislative offices, further information on the topic or directions about what action to take. All this can be customized for each client.

And for voter contact our new software provides complete control over call-back priorities. Call-backs can be assigned to specialized operators or groups of operators so that voters receive uniform contact throughout the campaign. With powerful quota management we are able to get the right message to the right voter every time. Simple audio and visual monitoring is secure, yet accessible anywhere in the world.

As our clients know, CERC provides both a high-tech *and* a high-touch solution. We stay on the leading edge of technology, but we have not forgotten that the firm succeeds principally because we work hard to understand and meet our clients' objectives. No amount of software alone can achieve that. Regardless of the level of technical sophistication needed, CERC is a company that realizes the human element is supremely important. That is why the staff has more than three-quarters of a century worth of collective experience, why we expand our knowledge base every chance we get, why we push the envelope and why we answer our own phones. ★

Leverage Some CERC Power: 7000+ Participants now in Database

As a full-service research firm, CERC conducts and recruits focus groups on virtually any topic. Consumer, B2B, high-value, political, ad testing, we do it all and now you can leverage the power of CERC's massive pre-qualified participant database. More than 7,000 San Diegans are members of CERC's participant pool. Clients can use this tremendous power to explore and develop topics or messages with just about any segment of the population. Early adopters, seniors, parents, truckers, Democrats, Republicans, non-partisans – they are all here for clients who need to understand what is really going on.

Another important feature: most of our participants are randomly selected. Some do seek us out, but the vast majority are randomly offered the chance to join CERC's database and that means far fewer "professional" focus group participants. Clients get reality.

7,000 folks at our nimble fingertips is nice, but CERC also recruits custom groups across the nation. From Florida to Washington and states in between, CERC has recruited high quality participants for years. Our success is rooted in attention to detail which includes rigorous callbacks and verifications. With more than 120 professional interviewers, tight deadlines are not a problem. High quality qualitative research: another way CERC gives its clients the edge. ★

84% Hung up on Robo-poll: Another Test Raises Serious Questions

Frequent readers of *The Edge* know that we take every opportunity to test the claim that robo-polling is on par with surveys conducted by live interviewers. Our latest experiment came on election eve last November. A client wanted to get a quick read on how the national election results might be affecting local turnout. The idea was to make thousands of calls in a very narrow window at very low cost. Enter robo calls.

For this project the client hired professional voiceover talent to record just three simple questions. Of the 2,637 numbers dialed, a human (the targeted voter on the list?) picked up the phone 1,379 times. A penetration rate of slightly more than half is, frankly, not too bad. But here is the big problem: Of those who answered the phone 1,103 hung up before responding to ANY of the questions. That's 80% who refused to take the survey! Another 60 people responded to only one or two questions so the actual refusal rate was 84%. In comparison, CERC typically gets *cooperation* from about 80% of the folks it contacts for a 3-question survey. Could a legitimate pollster possibly trust data when more than half the people contacted do not participate? It's time robo-polling firms start posting their true cooperation rates. ★

On CERC's Nightstand . . .

The Mental Game of Baseball, A Guide to Peak Performance
by H. A. Dorfman and Karl Keuhl

What's a baseball book doing here? As many baseball fans will tell you, the game can teach us a lot about life. Heck, some even go so far as to say baseball *is* life. This book is acknowledged by many players and coaches to be the go-to source for guidance on the game that is played between the ears. However, only one-sixth of it is devoted to playing baseball itself! Nearly everything in the book -- which includes chapters on goal-setting, dedication, taking responsibility, attitude, confidence, preparation, concentration, mental discipline, relaxation and even visualization -- can be applied as life lessons. Its authors repeatedly (and correctly) stress that baseball's mental aspects easily translate into other sports and disciplines. Anyone working in a competitive environment -- consultants, managers, candidates, elected officials, and even pollsters -- can learn important lessons from *The Mental Game of Baseball*. If you play sports or have a child who plays, this book is a must read. Even non-athletes with interest in baseball will find the book easy to read with important, practical takeaways. And if you are not into baseball, well, perhaps you should be. Key Quote: "*Trying harder when things are going poorly may be a good sign of character, but it is not the right way to improved performance. The player who maintains the same, solid approach regardless of adversity or good fortune, best controls himself and the situation. He is the real "gamer," because he lets nothing take him out of his plan. He lets nothing throw his emotions off balance. He comes through in the clutch because he knows what he wants to do in the clutch is what he wants to do always: to maintain self control.*" ★