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## Case

## Study

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### Contact Information

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## Software Provider Gains Insight into Customer Base

**Client:** A leading software provider.

**Business Issue:** A leading software provider sought a new method of surveying its customer base. The company asked InfoTrends to establish a research methodology that provided a more accurate profile of its customers, to determine the extent to which the firm could rely on its internal databases for customer research, and to provide a framework for comparing results over time by market segment.

**The Solution:** InfoTrends issued a pre-test followed by a structured survey that went out to several thousand qualified respondents. The pool of respondents consisted of customers from the company's opt-in list, InfoTrends' lists, and an additional panel list.

InfoTrends compared survey results from the opt-in list against those from the panel to determine differences among users. These efforts were designed to answer the following questions:

- What are the critical attributes and characteristics of the customer base by key market segments?
- Are there significant differences by list source (opt-in vs. third-party sources)? Do the differences matter?
- Are the company's opt-in lists sufficient for customer research? What caveats or weighting, if any, should the company make when interpreting the results?
- Should the company adjust its marketing mix?

# CASE STUDY

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*"InfoTrends is extremely responsive when we require information and insight. They understand our ever-changing industry and continually provide knowledgeable third-party feedback on our strategic planning and new product direction."*

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**The Results:** InfoTrends developed a summary report and detailed data files that addressed the following objectives:

1. Understand buyer/owner/user profiles by key segments
2. Determine any statistically significant differences in data by list source
3. Determine any weighting, sample composition, or other adjustments necessary to use alternative lists and questionnaire design methods to research the customer base
4. Understand user firmographics and demographics
5. Understand primary usage characteristics
  - Frequency of use
  - Experience with software
  - Length of use
  - Importance of program in overall applications portfolio
  - Typical applications
6. Understand current usage satisfaction metrics
  - Overall operation
  - Ease of use
  - Performance
  - Tools/Capabilities
  - Support
  - Awareness/interest in competitive products
  - Willingness to recommend the product

The client obtained a greater understanding of its customer base and the effectiveness of its research methods based on InfoTrends' research. It received valuable insight into the characteristics of all of its users, rather than just a portion of them, and identified improvements that it could make to its surveys in the future.

## **Getting Started**

For more information about InfoTrends project capabilities and how we can help you, please contact Matt O'Keefe at 781-616-2100 x115 or by e-mail at [matt\\_okeefe@infotrends.com](mailto:matt_okeefe@infotrends.com)



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