TRACK MARKETING GROUP®

SURVEY PROJECT NEEDS ASSESSMENT and AGREEMENT

Track Marketing Group is pleased to review the exact requirements for your survey project. A thorough needs assessment in the beginning can help us give you an exact estimate of the investment and help insure that we deliver what you desire. We have extensive experience serving associations and we're prepared to handle all aspects of your project.

As you review this proposal and any others that you may receive, please consider:

We are **detailed project managers**. We are most concerned about meeting your exact needs and doing so in a well thought and accurate manner. We also remain 100% flexible if your needs should change. Are you interested in details and accuracy?

We understand the **association marketplace** and have been helping associations **grow and retain members** for over ten years. Are you interested in working with a company that understands your unique marketing challenges as well as using surveys to uncover hidden opportunities and areas for growth?

We can provide **references of your peers** showing a high degree of satisfaction. A recent audited survey of our past clients showed consistently high scores in all categories.

We create surveys that are **tailored to your exact look and feel**. Do you want to work with a company that will create your survey from scratch so that it can look and feel the way you desire?

We are **fast and very responsive** to your needs. Did you have to wait long to get this proposal? We're ready to help you from day one. Whether you take advantage of our library of survey questions or rely on us to tackle every aspect of your job, you can count on Track Marketing Group to make things happen for you!

Our five-star promise includes: Customer Delight Focus, Strong Project Management, High Quality Work, Marketing Results Orientation, and Solid Value for Your Investment.

ABOUT YOU	
Organization Name	
Primary contact name & title	
Email address	
Telephone #	
Fax #	
Role in decision process	q Primary decision maker q Gathering information – decision made by: _______________ q Influencer in team decision
Date for survey to go live	
Timeframe to make decision	
Budget parameters	

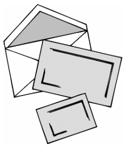
ABOUT YOUR NEEDS	
Previous Survey Experience: - **Have you conducted a similar survey in the past?** - **If so, when?** - **How was it completed?** - **How was the experience?** - **What was the response %?**	
Purpose/goals for new survey	

DESIGN - During the design stage, Track Marketing Group will assist or write the questions that will be asked for your survey. If necessary we will come to your office and for a meeting to further discuss possible types of questions that could give your survey the information desired. The final delivery during this stage is the code book containing all of the questions including the answer options (for pre-selected answers such as drop down boxes) and the size for all open ended questions.

DESIGN STAGE	
*** Writing the survey questions** *Track Marketing Group can help you write your questions or provide advice on the types of questions and scales that might be most appropriate for your specific survey*	q Client will provide all questions ready to ask q Client to provide draft/Track Marketing Group to edit q Track Marketing Group to own writing questions with client feedback
*** # of questions**	
*** # of unique surveys**	
# of questions that branch *Branching allows respondents to see only the questions that are relevant to them based on answers to previous questions. This saves them time.*	
Type of questions *There are many formats of questions and depending on your needs, specific formats may be most appropriate.*	q Mostly open ended q Mostly button/check box questions q Mix of open ended and button/check box

BUILD – The build stage involves the actual preparation of the physical survey, including options for online (web), print, email, fax, telephone script, or a combination of multiple formats. The survey is created from scratch and can have any look and feel that is desired by the client.

BUILD STAGE	
*** Web Survey** *We will design your online survey to fit your unique needs including mimicking the look and feel of your website. We can also use a color coded scale that will be aesthetically pleasing and make it easier for your respondents to identify what is good and what is poor on the scale.*	q Track Marketing Group to build web page and host site (can link from client) q No web survey
*** Print (Hard Copy)** *Track Marketing Group can design a printed version of your survey and can handle all aspects of the reproduction including one or more colors and any paper stock. The printed survey can be mailed, used as a hand-out, or faxed to respondents.*	q No print survey q Track Marketing Group to design print based survey q Survey to use scan technology q Track Marketing Group to print survey Qty: _______ (q single or q double sided) # of pages: _______ per set Ink: q Black or q Black + one color q Client to design print based survey q Client to print survey
*** Email Based**	q No email survey q Email copy of survey with option to respond via email provided
*** Telephone Based**	q No telephone survey q Write script for telephone survey



INVITE - There are many ways to invite your prospective respondents to take your survey. We can send out a personalized email, a fax broadcast, direct mail piece with an invitation to take the survey via the web or another method, or phone invitations. Which way works best for your survey depends on a many factors and we can help you make the best decision.

INVITE STAGE	
Audience to be invited	
Incentive offered to respondents	
*** # of people to be invited to take survey?**	
Respondent Identification *This can be asked as a specific question and still offer an incentive by letting the respondent know the survey is being conducted by a 3rd party company and all responses will be kept anonymous for those that requested that.*	q Anonymous only q Anonymous or self-identified (respondent to enter their demographic information) q Require self-identification
*** Safeguards against people taking the survey more than once** *We can add a random and unique code to each invitation. This allows us to make sure that people do not take the survey more than once. This code can be embedded automatically in a link from an email invite.*	q Password protected site q Identified via code that respondent enters q Identified via unique URL in invitation automatically (from email only) q De-dupe on select demographic info entered
Expected response rate (% or #): **(for information only – this is not a commitment to meet this rate of return)**	
Give respondent impression that survey is conducted by: *This can add credibility that respondents can remain anonymous.*	q Client (Track Marketing Group to remain transparent) q Track Marketing Group (neutral third party research company)
*** Which methods would you like to use to invite people to take the survey?** *There are many different ways to invite your prospective respondents. A combination of multiple methods can help increase your response rate.* *Using a single method may limit your response rate.*	q Link from client web site q Client to own - existing advertising options (newsletter, email, etc.) q Track Marketing Group to send personalized email invite: #_____ q Track Marketing Group to send fax broadcast: #_____ q Postcard Promotion® to **announce** survey URL: Size and qty of mailing: ________________ q Postcard Promotion® as **reminder** of deadline: Size and qty of mailing: ________________ q Sent to all q Remove respondents? When send? ________________ q Track Marketing Group to address and mail actual survey specs:_____________________________________ Postage rate on outgoing survey: q First class pre-sort q Standard: Cheaper/slower rate q Outbound personal rep telemarketing q Outbound auto-telephone

RESPOND - Dependant upon the way your invitations were delivered, your respondents can respond in different ways. They may be able to respond via email or fax, or respond directly on the web. If responses come in via non electronic methods such as mail or fax, the responses will need to be data entered into the database. All response data is downloaded from web respondents and a comprehensive database is backed up to CD.

RESPOND STAGE	
Can people respond after survey is closed? What happens after the deadline? *We can let your audience know that the reporting has begun, but that you would still love to have their feedback.*	q Yes q After close, give option to take survey q No q After close, put up survey closed page Remove survey from server on or after __________
How long should survey be live before survey is closed and reporting begins?	Keep live for _____ days **or** close on __________
*** If survey is hard copy and offer is made to return via mail:** *Your respondents can send the completed printed surveys back to your office or to Track Marketing Group. Either way, Track Marketing Group or the client can perform the data entry.*	q Return to Track Marketing Group using BRM permit q Est. # who will return via mail:_______ q Return to client
Fax response option	q Return to Track Marketing Group via fax q Return to client via fax
*** How would you like the responses to be handled as they are completed by your audience?** *There are times when you want the responses sent back to you right as they are finished. We can set up a survey so you will be emailed with the responses right as they are submitted.*	q All responses logged into a database for future reporting and analysis q Send via real-time email (not practical for large surveys and offers limited reporting options in the future)
Do you desire option for people to come back to survey in progress at their convenience? *For multi-page and more in-depth surveys we can offer your respondents the ability to save the URL of any page, stop and come back to that URL to continue the survey at a later time.*	q Yes – desire ability to save unique URL q No – people must take survey at one sitting
*** Data entry of returned (does not apply if survey is web only with no hard copy)**	q Client to data entry q Track Marketing Group to data entry: Estimated # hours:________________
*** Respondent Assistance** *If desired, Track Marketing Group can field any questions about your online survey either by phone or email.*	q Track Marketing Group to field respondent inquiries about questions q Contact Track Marketing Group via email link q Contact Track Marketing Group via telephone (703 area) q Client to field all inquiries
Pop-up help screens provided? *We can add pop screens throughout your survey giving your audience more information about certain questions. This is used best for areas of the survey that might not be common knowledge for everyone taking the survey. We can also utilize these for directions.*	q Yes – approx #________ q Automatically pop-up q Click on link to see pop-up q No pop-up screens
Hour glass status graphics? *We can add graphics to the bottom of the survey that will let those taking the survey know how far along they are in the survey.*	q Yes q No

REPORTING - With a wide variety of reporting options, Track Marketing Group takes raw data and transforms it into valuable information in a wide variety of formats. From mean and standard deviation reports for your rated questions to a breakdown of your open ended responses to any number of cross-tabs, Track Marketing Group can analyze your data and help you see what it all means.

REPORTING STAGE	
Minimum responses for reporting (% or #)	
*** Reporting requirements (choose all that apply)** *Track Marketing Group offers a wide variety of reporting options. Through a discussion of your needs we can figure out the proper types of reporting to get you the data and information that you need.*	q Summary reports (sum, mean, std dev) q Open ended data responses q Report detailed responses for each person q Export of data to a file and archive to CD q Cross tabulations – approx # _________ q Graphs – approx # _________ q Custom analysis of findings/data mining q Executive summary report/presentation (level of detail)___________________________ q Link to existing respondent data q No reports / export data only
*** Output delivery** *Your reports can be delivered in any number of ways. We can email copies and provide printed, bound color copies of your report presentation. You can also receive a permanent archive of the reports and raw data on a CD-ROM disc.*	q Reports will be sent via email q Reports will be delivered on a CD-ROM q Reports will be delivered in a booklet (print) q # B&W copies __________ q # Color copies __________
*** Survey duration (choose one or more)** *Though most of our surveys have a specific end date, depending on the type of survey you are conducting it may make more sense to have your survey continue for a long period of time with specific dates for reporting throughout.*	q Single deadline (close at a set date and report) q Interim reporting - same survey with report provided at multiple intervals q On-going - No end date - how often would you like reports? q Same survey given to multiple audiences and reported separately
***Training** *To make you more comfortable with your data and be able to look at it and gather specific information that you may need we offer a training session on accessing your data via either Microsoft Access or Excel.*	q Track Marketing Group to train client on using Access to retrieve and cross tabulate data (1 to 2 hour class) q Held at client office q Held at Track Marketing Group office q No training provided on accessing data

INVESTMENT

Please see the details above (pages 1 thru 5) for the specifications for your project. The items listed with a star may have an impact on the cost. Other items do not have a direct impact on cost and can easily be changed prior to starting the project without a change in the estimate of investment.

Survey design (may include question writing/editing) Price includes the # of questions and # of branching questions indicated in the design specifications. If this quantity should increase, there may be an additional charge.	**$**
Survey web design and hosting Price includes 5 hours of design time. Additional time may be required in more complex situations or based on client requested changes and will be billed at an hourly rate of $85.	**$**
Invitation services (e.g. personalized email and fax broadcast) **Specifications included in this estimate:** (price will change if quantity or specifications change)	**$**
Postcard Promotions® (design, print, mail) **Specifications included in this estimate:** (price will change if quantity or specifications change) **Postage**	**$**
Print production services (e.g. print surveys, letters, envelopes) **Specifications included in this estimate:** (price will change if quantity or specifications change)	**$**
Addressing and mailing services **Specifications included in this estimate:** (price will change if quantity or specifications change)	**$**
Postage (outbound) – estimate only, actual to be charged. Based on _____ mailed.	**$**
Postage (inbound) – estimate only, actual to be charged. Based on _____ returned.	**$**
Reporting services / Archive data to CD-ROM	**$**
Training	**$**
Data entry (estimate only) for ____ hours - estimate only, actual to be charged	**$**
TOTAL INVESTMENT =	**$**

______________________________ ____

Date of Proposal **Authorized by**

Estimate valid for 6 months from the date this document is given to the client. Pricing may change if the proposal is not approved within this timeframe.

TERMS & CONDITIONS

This proposed project is subject to the following terms & conditions:

Scope of Work: The estimate of cost is subject to change if selected items above are removed from the scope of the project. The total estimate applies if the project is conducted as specified in this proposal.
Payment Terms: A deposit equal to 1/3 of the cost shown above (less postage) will be considered due at the time the agreement is signed and the work begins. 100% of postage must be paid prior to the mailing date. The second third is due once the survey is live on the web or mailed (if a print only survey). The remaining third is due within 30 days from the report delivery date.
Discounts: A final invoice will be included with the report. Any discounts must be requested prior to the proposal being presented. Any discounts that are stated in percentage terms apply only to the survey design base cost.
Changes: There may be an additional cost if the client changes the content or branching or order of the questions after they are approved for the build stage. There will also be an additional charge if the content is changed in any manner after the proof is approved by the client for print production.
Reporting Cancellation Option: If the client is not satisfied with the rate of response, they may choose not to utilize the reporting services, however the cost associated with items other than reporting and training are considered due and must be paid in full within 30 days of the close date for the survey.
Liability Due to Errors: In the unlikely event that survey data is lost or data is somehow changed or altered from the original data collected (including faulty web collection devices and data entry errors), including by the fault of Track Marketing Group, liability is limited to the cost of the survey. Track Marketing Group can not be responsible for additional revenue or losses due to survey errors including errors in calculation or presentation of data. Track Marketing Group will provide regular data back-ups of all data collected. If major errors are made in the production of the print based survey due to errors within the direct control of Track Marketing Group, liability is limited to reproducing another printed report and distribution to the same audience. If errors are not caught by the client at the proof stage, Track Marketing Group can not be responsible for absorbing the postage expense associated with resending the survey.
Server Down: In the unlikely event the server that is hosting the survey is down for a period of more than 4 hours at a time (during business hours), liability is limited to re-sending the invitations out via email. If down time exceeds 3 business days, an additional invitation may be offered via the original method used to invite people to respond.
Responsibility for Content: Track Marketing Group will not filter or limit the ability of respondent's feedback and Track Marketing Group is not responsible for the content of this material including material that the client may find objectionable. Track Marketing Group does not review the content provided by respondents for accuracy unless specified in this agreement.
Confidentiality: Track Marketing Group agrees not to share specific responses from the survey with anyone outside of the client organization without written permission. Track Marketing Group may reference the scope of the survey, the questions used, and make mention of the client name as a reference account unless specifically directed in writing that these are not options available to Track Marketing Group. If the client directs Track Marketing Group to offer an anonymous option to respondents, Track Marketing Group will not provide respondent level data for any person who requests to remain anonymous.
Prizes: If a prize or other incentive is offered to respondents, Track Marketing Group may at the direction of the client select one or more winners. Client assumes full responsibility for issuing the prize and all tax and legal requirements are the full responsibility of the client.
Pricing: Pricing shown on this proposal may vary from prices published elsewhere in print or online and the prices listed on this agreement take priority and represent the actual cost which the client agrees to pay.
Deadlines: While timeframes are provided as an estimate and every attempt will be made to meet specified deadlines, due to factors outside of Track Marketing Group's control (such as client providing approval of questions and people not taking the survey in a timely manner), Track Marketing Group can not guarantee the exact dates for the survey to be live, invitations to be sent, or reporting to be completed. Updated timeframes will be available to the client as the project progresses through the various stages.
Additional Reports: If the client requests additional reports or requests Track Marketing Group to re-run the same reports with different data in the future, there will be an additional charge for this special request.
Estimated Costs: The estimated cost of postage (may be for out and in-bound mailings) as well as data entry hours. Actual expenses may vary and the client agrees to be responsible for the actual costs incurred to complete the project according to the specifications shown above.
Credit Line: Track Marketing Group reserves the right to include a credit line mentioned "Survey produced by Track Marketing Group Marketing Group" with a link to our home page on the final thank you page of the survey, unless the client requests otherwise.
Compatibility and Support: Most surveys are designed to work from a standard web browser and are optimized for a recent version of the browser and operating system that is Windows compatible. However, the survey often functions normally on an Apple mac based web browser. When Track Marketing Group is contracted to provide support to respondents, support is limited to verifying that the server is up and functioning normally and offering an alternative method to respond such as fax or email.

CLIENT ACCEPTANCE

I authorize Track Marketing Group Marketing Group to begin work as outlined under this proposal and agree to be responsible for payment of $_________ as specified on page 6. Figures do not include any applicable sales tax. Track Marketing Group collects sales tax for firms based in VA, DC, MD, and MO. Generally, sales tax applies to production related items.

Please sign and return this contract (all pages) with your payment to Track Marketing Group at:
85 S. Bragg St, Suite 203, Alexandria, VA 22312 or fax to (703) 750-6722.

______________________________ ______________________
Signature Date

______________________________ ______________________
Name Title

Purchase Order #: ____

PROJECT STEPS AND GENERAL TIMELINE

DESIGN STAGE	
1A: Write questions	
1B: Outline flow of survey (branching & skipping)	
1C: Create codebook of all questions and answer choices	
BUILD STAGE	
2A: Design look and feel of web survey	
2B: Build survey with all questions	
2C: Layout print survey	
2D: Test web survey and make sure data is reporting correctly	
2E: Final client approvals	
INVITE STAGE	
3A: Decide incentive for responding	
3B: Write/design invitation (email, fax, print)	
3C: Final client approvals	
3D: Distribute invitations	
RESPOND STAGE:	
4A: Live date	
4B: Reminder notice sent / option to pull respondents	
4C: Close survey date	
REPORTING STAGE:	
5A: Download all data from respondent database	
5B: Data enter any surveys received via mail/fax	
5C: Clean-up data in database (validate/dupes)	
5D: Run reports	
5E: Data analysis	
5F: Present reports to client	
5G: Train client on data retrieval from CD	

Deadlines: While timeframes are provided as an estimate and every attempt will be made to meet specified deadlines, due to factors outside of Track Marketing Group's control (such as client providing approval of questions and people not taking the survey in a timely manner), Track Marketing Group can not guarantee the exact dates for the survey to be live, invitations to be sent, or reporting to be completed.

Updated timeframes will be available to the client as the project progresses through the various stages. Any estimated timeframes are based on typical average jobs and are for general illustration only.

If a specific date is critical to you, please alert your project manager so that every effort can be made to accommodate your needs.

REPORTING OPTIONS

Open Ended Responses. Below is an example of the way the responses will be outputted. The types of responses can be the most beneficial because your members will truthfully tell you what they think about your organization.

Question #14: Comments: What do you think about our Association?

- "Your association gives us the best value for our dues dollar. Keep up the good work!"
- "It would be helpful to have had an ""express"" option to get right to a live person."

Statistical Responses: These questions can be rated in any number of different ways. For each rated question you will receive a count of each choice, the mean and the standard deviation.

Q17. Rate Your Satisfaction

Mean:		3.3
Standard Deviation:		1.2
Responses	Count	Percent
1	10	8.9%
2	19	16.9%
3	21	18.8%
4	48	42.9%
5	14	12.5%

Cross-tab: These reports are based off of statistical responses but get much more in depth into the statistics. Cross-tabs take two variables and look into how they interact. For example, if your survey asked a question about member age and another about overall satisfaction of your association, it might interest you the difference in overall satisfaction dependant upon age. If you look at the table below you will see the means of each different grouping as well as the number of responses in each intersection. This table shows that satisfaction, overall, goes down as age increases.

	(1) 35 years old or less	(2) 36 - 45 years old	(3) 46 - 55 years old	(4) 56 years or older	**Mean**
Overall Satisfaction of 1	0	2	5	5	**3.25**
Overall Satisfaction of 2	1	5	20	3	**2.86**
Overall Satisfaction of 3	3	11	12	1	**2.40**
Overall Satisfaction of 4	5	13	13	2	**2.36**
Overall Satisfaction of 5	1	9	0	1	**2.09**
Mean	**3.6**	**3.55**	**2.66**	**2.25**	

Individual Report: To learn what each respondent answered, an individual report can be delivered in a .doc format and every respondent's answers will be set apart from the others. This will allow you to follow up with specific respondents (assuming the answer was not provided anonymously).

We also offer a number of other types of reports and graphs including executive summary presentations. The ones above are the most common types of reports but all types of custom reports are available for any survey.

Simply let us know what types of information you are looking and we will find a way to get it for you!