BBA THESIS GUIDELINES

SSM BBA THESIS GUIDELINE

I. Introduction

Congratulations! You are almost through your BBA Program. The last part of the BBA program is concerned with your research / thesis. That is a written thesis of approximately **8,000** words which provides details of individual research into an agreed management argument. Your thesis will need to contain an **abstract** which is an executive summary as well as more detailed information relating to the study undertaken.

The thesis will enable you to undertake an enquiry in an area of your choice. It will require you to **identify an appropriate management issue**, **undertake adequate background research, apply theoretical knowledge in a practical situation and propose realistic solutions to the problems identified**.

The thesis thus provides an opportunity for you to demonstrate the knowledge, skills and competencies that you acquired during the course, to identify management/business problems, formulate and evaluate solutions and produce realistic, acceptable recommendations for actions.

Learning objectives

The thesis provides an opportunity for you to:

- Develop an ability to conduct a research investigation within or relating to an organization
- Integrate and inter-relate concepts, techniques and skills acquired in the course of the program
- Examine earlier research and theory which have a direct bearing on the thesis topic
- Demonstrate professional competence suitable for the award of the BBA

Most Frequently asked Questions:

1. Q: What is the expected word count of my thesis?
A: About 8,000 words +/- 10%.

2. Q: Does my thesis need to be an original piece of work?
A: YES. See your course handbook for further details on academic honesty.

3. Q: Must my thesis include new empirical research?
A: No, not necessarily. If you wish you may reassess previous research data on your chosen Topic.

4. **Q: What subjects are allowed?**
   A: Broadly any area related to your chosen specialization.

5. **Q: Do I need to identify my thesfortopic by myself?**
   A: Yes, or ask for help from your professors.

7. **Q: What happens if I fail?**
   A: Depending upon the circumstances, the faculty board may allow you to resubmit an improved version of the thesis.

II. Your research

The BBA research requires **analysis,** including **explanations, relationships, comparisons, predictions, generalizations, and, if possible theory formulations theories**. An appropriate research question needs to be formulated first followed by the examination of existing theories, concepts and literature, the use of appropriate methodology for useful information gathering.

Your research topic

In choosing an appropriate topic you need to consider identifying a subject that is specifically interesting to you and relevant to the development of your skills as a manager.

You also need to decide what your career goal is after you graduate. Then decide which topics might give you a comparative advantage in getting your ideal career and proceed to research them (Library, the Internet, with faculty, with contacts etc.) If you already have a job and just need a project to graduate ask your new employer what interesting questions there are and decide what you are good at - e.g. statistical analysis, interviewing, etc.

However before selecting the topic you should take into consideration:

- The availability of information
- Your time
- Your capabilities and interests
- The deadline for the submission

Once you have found your general area of interest and have done preliminary investigation of the subject, you need to formulate a **specific research question**.

Your research objectives

Your research objectives should be derived from the overall research question. They need to address the **specific** areas of the research question that you will explore based on your understanding of the theory and the access to an organization if you have chosen one as a case study.

III. Phases in writing the thesis

- Proposal – to be approved by your project supervisor before proceeding to the final thesis

- In-depth Literature Review
- Data Collection
- Write Up

1. Thesis proposal

First, do the preliminary research of the secondary sources to find out what information already exists on your chosen topic and then write a draft of the Literature Review section to narrow your search and demonstrate why the thesis as research is of importance. Keep in mind that your proposal needs to explain in detail **the topic to be addressed, the reasons for choosing it, the data collection instrument and the data collection plan – how data will be obtained and the analytical techniques (quantitative/qualitative) which will be applied.**

Your research proposal should include: **title; abstract which is a short summary of your proposal; literature review; proposed data collection methods and analysis plan; potential practical, empirical and theoretical problems; conclusions; and references**. You may also attach draft questionnaires or interview questions for the approval. Once you have received feedback on your project proposal, refine your project and data collection instruments as suggested and proceed to writing your final thesis.

2. Literature Review

You are expected to **thoroughly** and **critically** review the literature in your chosen area in order to identify the appropriate theories, models and conceptual ideas. It will form a few chapters of your thesis depending on the nature of your research. Please note that the information you gather during your search from external sources which you refer to in your thesis must be acknowledged by the name of the author, the year of publication and the page number if it is a direct quote, for example (Malhotra, 2004, p. 254), if you however paraphrase the original text the page number may be omitted e.g. (Malhotra, 2004). Moreover, you must identify all external sources you referred to in the body of your thesis in the **References** where you need to precisely state **the name of the author, the year of publication, the title of the publication, the place of publication and the name of the publishe**r (see p. 7 for examples).

3. Data Collection

Please keep in mind that collecting data is a very time consuming process therefore depending on your available time you need to take into consideration diverse data collection methods such as **questionnaires, interviews, observations, focus groups** etc. Depending on your chosen data collection method you also need to decide whether the **quantitative** or **qualitative analysis** will be appropriate to interpret your gathered data.

To find out more about primary data collection methods see 'Marketing Research. An Applied Approach.' By Naresh K. Malhorta and David F. Birks or any other business research book.

Please note that while you are waiting for the return of your questionnaires or an appointment for the interview etc. you should start drafting your **Introduction** and **Literature Review** chapters not to waist your time.

4. Write Up

Once you have reviewed the secondary sources and collected your primary data you are ready to put it all in words. By this time you should have already written a few chapters referring to other research studies conducted in your chosen field.

IV. Format of the thesis

The thesis **must** be typed using **Times New Roman no 12, line spacing of 2** should be used except for quotations where single spacing is recommended, all pages must be (centrally) numbered, and it has to be bound. Plain paper A4 size (210x297mm) of good quality and of sufficient opacity must be used. Margins at the binding edge must NOT BE LESS than 40 mm (1.5 in) and all other margins NOT LESS than 25 mm (1 in).

1. Spelling

Spelling in accordance with either the Oxford English Dictionary or American usage can be used as long as use of one or other source is consistent throughout the thesis.

2. Punctuation and abbreviations

Punctuation should be used according to conventional orthography and strictly according to sense. Single rather than double quotation marks should be used. Commas should not be used in numerical quantities. The decimal point should always be indicated by a stop rather than comma. Abbreviations should be avoided except where their usage is common (e.g. UK, USA, etc.). Where their entry is unavoidable or even desirable, the first appearance should be spelt out in full and in parenthesis as thus:........' such recommendations having been suggested by the World Health Organization (WHO)' Commonly used abbreviations such as 'e.g. and 'n.b' should always appear in the lower case.

3. Tables and Figures

Tables and figures should appear as soon as possible after they are first mentioned in the text and should be numbered consecutively. Tables should not be designated as figures and they should be numbered quite separately from other illustrative material. Only horizontal rules will normally be necessary and these should be typed. The title of the table should be typed with initial capitals and lower case lettering ABOVE the tables, like so:
Table 6: Sensitivity of costs of variation in discount rate.

V. Style

1. Mathematics

Mathematical expressions should be clearly separated from each other and from the preceding and following text. They may be numbered for reference by figures in parenthesis, typed flush with the right-hand margin. Great care must be taken in the typing or writing of mathematical equations, particularly in the correct positioning of subscripts and superscripts and in the alignment of the various parts of an expression. Letters used as mathematical symbols may be typed in italic facilities are available, Greek letters may also be typed if facilities are available, otherwise they should be written by hand using black ink, matched as closely as possible to the usual printed version.

2. Quantities

The commas should not be used in numerical quantities. If there are four digits, they should be typed close up: where there are more than four, space should be left between each set of three i.e. 3000 not 3,000; 3 000 000 not 3,000,000. Show the decimal point as a full point, and not a comma. Unless accompanied by a unit, numbers from one to ten are usually spelt out in full.

3. Use of Capital Letters

The use of capital letters in the text should be kept to the absolute minimum, restricted to identification of proper nouns and trade names or in use of common abbreviations. They should also be used when referring to figures and tables in the text, e.g. Fig 1., Tab 1., Tab 2.

4. Headings

Main chapters should be numbered from 1 onwards. Subheadings should follow the same order, e.g. 1.1,1.2.

5. References

SSM is following the citation format of the American Psychological Association (APA). The student is expected to be very familiar with this format and must always be updated with the new rules of APA.

The references should list all works consulted by the student in alphabetical order by name of principal or first name author. Thereafter, the work shall be identified by the year of publication, title, edition (if relevant),place of publication, publisher, volume number and page references.

Examples:

Books:

Naresh, K. M. and Birks, D. F. (2003) Marketing Research: An Applied Approach. Edinburgh Gate: Pearson Education Limited.

Journals:

Niedermeier, P. L. (2003) 'The New Marketing Model', Journal of Services Marketing. Vol 8, No 3, pp 178-201.

6. Appendices

Lengthy derivations, experimental results, computer programs, exhibits etc. should be placed in appendices identified in serial order by Roman numerals, e.g. Appendix I, Appendix II, Appendix X.

VI. Structure of the thesis

Your thesis needs to contain:

- **Title page see below:**

OFFICIAL TITLE PAGE

Name

Submitted in Partial Fulfillment of the Requirements
for the Degree of
Bachelor of Business Administration

Presented to the

Swiss School of Management

"Title of Final Paper"

by

John Smith

Supervisor: Name, Name

Reviewer: Name, Name

Reviewer: Name, Name

Month Year, City

Copyright Statement

LAST PAGE OF THE MANUSCRIPT

Declaration of Authorship

I, (name of author), hereby declare that this dissertation/thesis entitled: "title of the thesis"

and the work presented in it are my own and has been generated by me as the result of my own original research. I declare that I have authored this thesis independently, that I have not used other than the declared sources/resources, and that I have explicitly marked all material which has been quoted either literally or by content from the used sources. According to my knowledge, the content or parts of this thesis have not been presented to any other examination authority and have not been published. Where any part of this dissertation has previously been submitted for a degree or any other qualification at this university or any other institution, this has been clearly stated. Where I have used or consulted the published work of others, this is always clearly attributed. Where I have quoted from the works of others, the source is always given. With the exception of such quotations, this dissertation is entirely my own work.

Place, Date:

Signature: ______________________

- **Acknowledgements -** thanking people for their support and help
- **Abstract –** introduces the issue(s) discussed in the thesis, provides a short summary of collected data and its findings**,** highlights your conclusions and recommendations as well as indicates clearly your contributions to the knowledge.
- **Table of Contents -** with chapters and sections of the thesis and their page references

- **Introduction** – sets the scene and provides necessary background by explaining **why** the research was conducted and its importance and pinpoints the significance of previous studies on the topic.

- **Review of Related Literature** – contains one or more chapters discussing in detail theory and past research on the issue(s).

- **Statement of The Problem** - A statement of a problem for a thesis project is a clear and concise description of the problem that the research aims to address. It should provide an overview of the main issues or challenges surrounding the problem, and explain the significance of the problem for the field, industry, or society. The statement of the problem should also outline the research questions or hypotheses that the research aims to test, and provide a framework for the research design, methodology, and analysis. The statement of the problem should be framed in a way that is specific, focused, and realistic, and should be based on a review of existing literature and empirical evidence.

- **Hypothesis -** a statement that outlines a relationship between variables and aims to answer a research question. A hypothesis must be clearly stated, specific, measurable, and testable. It guides the research process and helps the researcher to determine the most appropriate methods of data collection and analysis.

- **Research Methodology** – detail description of your chosen data collection instrument
- **Scope of Limitations** – overall evaluation of your research process assessing its strengths and weaknesses including critical assessment of your chosen research methodology and proposed improvements for the future studies.

- **Findings** – discussion of all what you have discovered and the quantitative/qualitative analysis you have used to analyze your collected data including all tables and figures.

- **Conclusions and recommendations** – flow clearly from the body of evidence you have presented in your findings section and indicate identified problems as well as suggestions for solving them including specific actions to be taken.

- **References** – see p. 7 for details

- **Appendices** – see p. 7 for details

When you have finished writing it, take a break and afterwards read it all over again and ask a friend to read it too, an objective opinion is always good, they might see mistakes you haven't spotted. When you can't look at it anymore, submit your final thesis. WATCH OUT FOR THE DEADLINES. Then you need TO DO YOUR PROJECT PRESENTATION. At this point, you are defending a "finished" product. A commission of the faculty board will ask you a few questions in order to determine whether it really is your work so please **DO NEVER EVER COPY SOMEBODY ELSE'S WORK**.

Think positive and don't look only at the work behind your thesis. But rather, be happy about the contribution you are giving to the academic– and the professional world of business.
Don't be shy to ask for help. The Swiss School of Management faculty and management will always be on your side and happy to assist and guide you during your research phase.

See below an Example of a Thesis Proposal

Bachelor Thesis Proposal

Swiss School of Management
Bachelor of Business Administration
Date: 20.01.2020

Author:	Supervisor:
E-mail:	E-mail:
Phone:	Phone:
Specialization:	Defense Planned:

Notes: The proposal should be 2-3 pages long. Save it as ***"Yoursurname_proposal_date.doc"*** *and send it to bpaolo@y7mail.com. Subject of the e-mail must be: "Your surname_JPM194_proposal-date)".*

Proposed Topic:

Business Plan for GP Mark – GP InSight

Topic Characteristics:

My business plan will focus on developing the strategy to perform a general business reengineering process to GP Mark, my father's marketing research agency. GP Mark is a family owned company created on 2003, which major business is conducting quantitative public opinion studies on political subjects. Qualitative research is also conducted, but in a less specialized manner. The General Manager is Jaime Gonzalez, my father, with more than 20 years of experience on the field. There are not "fixed" employees on the company because we work by projects, so we hire personnel depending on the needs of the project. Over the last years, our clients have been reduced to a single political party in Mexico, the PAN, who recently lost the elections and therefore has a lower budget to invest on research. For this reason, the company has been slowly decreasing to the point of having only three projects per year, which is generating the idea of eventually closing it down.

Hypotheses:

1. GP Mark can be saved from closing down by diversifying its clients and market
2. A whole business re-engineering process is needed to succeed
3. Joining the Mexican Marketing Research Association is possible and useful
4. A new division of Marketing Research on mass products should emerge
5. Focusing on quantitative studies (rather than experimenting with qualitative) should be the best way to approach new markets

Methodology:

I will develop the strategy to conduct a business re-engineering process, starting by changing the brand's image (which is not really known in the market in the way of having a reputation outside the political field, so this change will mainly be on the visible features like logo, communications, etc).

Then I will proceed by proposing a new internal organization creating different business units and hiring fixed employees in order to have a better balance of the work load. I will research and consider the implications of getting fixed employees, such as providing them with all the entitlements the Mexican law require.

I will also research the requirements to join the Mexican Marketing Research Association, and assess the cost/benefit relation on becoming a part of it.

Finally, I will set up a plan to create a new division focused on mass products' quantitative studies, GP InSight, and research for methodologies from competitors which can fit with our current resources and competencies in order to develop new methodologies which can solve the needs of our new clients.

Outline:

1. GP Mark's Profile
    a. History
    b. Current problematic
2. Business Re-engineering process
    a. Swot Analysis
    b. Mission, Vision, Values
    c. Brand Image
    d. Internal organization
    e. Implications
3. AMAI (Mexican Marketing Research Association
    a. Introduction
    b. Requirements to join
    c. Implications
4. GP InSight
    a. Core Business
    b. Existing Methodologies in the market
    c. Development of new GP InSight methodologies
    d. PR Strategy
5. Financial projections
6. Conclusions
7. References / Bibliography

References / Bibliography:

AMAI webpage

. . . .

Author   Supervisor *

GP Mark History

GP Mark is a family owned company created on 2003, which major business is conducting quantitative public opinion studies on political subjects.

In 1993, my father, Jaime González, started working as a Consultant on Gemark SC, a marketing research and consultancy agency in Mexico City. Gemark's clients were diverse, from the food industry to the technology one, and their main strength was the organization and analysis of focus groups. Mr González brought a big client to the company: the PAN, the second most important political party in Mexico. The PAN wanted to conduct quantitative studies to measure the public opinion of its candidates, so Mr González created the quantitative branch of Gemark, recruiting and training a solid team of temporary field workers, and developing an Excell, macro-based program to process the databases. This new team conducted a series of polls in several states, and gave Gemark a new reputation on the quantitative research market.

In 1994 Gemark received one of their most important projects since its foundation: conducting the first Exit Poll and Quick Count in Mexico for the national elections on August 24th, 1994. Because of the magnitude of this event, three companies were trusted to conduct it: Mitofksy-Bimsa (today Consulta Mitofsky), which was at the time and continues to be the largest and absolute leader of the Public Opinion measuring in Mexico, Gabinetes de Estudios de Opinión GEO (today Indagaciones y Soluciones Avanzadas ISA), another large agency with years of experience and high credibility, and Gemark. Mitofsky was hired by Televisa, the largest multimedia mass media company in Latin America, while GEO was hired by the newspaper Etcétera. Results were published on the same night of the election, giving victory to the PRI, the same political party that had governed the country for 70 years.

However, the PAN wasn't as far behind from the PRI as usually, so they continued to designate a significant amount of budget to Public Opinion Research, and because of the accuracy of Gemark's results and the accessible prices it offered, Gemark became one of its most important suppliers on this field. By year 2000, the business relation between the PAN and Gemark was very solid, resulting on the realization of several projects during the year, including a national poll previous to the elections where results were more accurate than those published by Consulta Mitofsky, and exit polls and quick counts in a couple of states. On these elections, the PAN was victorious with Vicente Fox as the President of the country, so a new era began not only for the party but for the country itself.

As the quantitative branch of Gemark had become more and more independent through the years, Mr Gonzalez decided it was time to found his own company, completely focused on political public opinion polls. That's how on January 22th, 2003 GP Mark is born, with my brother Daniel, my sisters and my mom in my representation, since I was a minor at that time, as shareholders.

This transition was actually very friendly, since there was now a personal relationship with the client, and Mr Gonzalez already had a team with the necessary know-how to perform their activities. He continued to coordinate field work and the relation with the clients, while Daniel became the General Manager and was left in charge of the processing of information and results generation. I myself spent several afternoons on the field and on the office, learning every step of the research method.

Business became more solid year by year, especially the ones where there were local elections. The Presidency of the Republic became a client of ours, as well as some government departments as the Secretary of Communications and Transportation, so new and interesting projects emerged, even qualitative ones. On 2008, Daniel went off to Barcelona to study an BBA, and I became responsible for the processing of information and results generation of the company. It was a very challenging experience since I was very young and at the first years of college, but during that year I fell in love with this industry and I understood the responsibility of not only handling correctly the company my father had started, but of making it grow and transcend through the years.

Current Problematic

On 2012, the PAN lost the national elections and most of the local ones, which caused a deep budget cut for research. Since that year, GP Mark performs only a couple of studies every semester, and business continues to decrease. 2014 was the year with lowest billing on the history of GP Mark, which is making Mr Gonzalez think it is time to shut down the company, along with some health problems he had suffered lately. Daniel also thinks it is time to move on, and is looking for new opportunities in another industry.

I, however, think it is the time for GP Mark to re-invent itself, to look for new clients and new markets, to innovate with different methodologies and get formal accreditations. This is why I started this business plan.

Business Re-engineering process

From its foundation, GP Mark has never had a mission/vision statement, it has never created contingency plans, and the business organization itself is confusing. This is why I think a business re-engineering is needed even before looking for new clients.

Mission, Vision, Values

Mission:

To understand our customer so deeply that we are able not only to deliver the most accurate results but to provide strategic recommendations to strengthen their businesses.

Vision:

To be the boutique marketing research and public opinion agency in Mexico that changes the relationship between customers and agency from tactical to strategic partners.

Values:

- Honesty
- Responsibility
- Human oriented
- Customer-focused

Brand image

Current

The brand is known only by its clients, who perceive it as an effective family-owned company with great experience in coordinating and analyzing public opinion studies, which is concentrated in the person of Mr Gonzalez.. They value the flexibility and fast responding capability proper of the small size of the agency, however they would want to perceive a higher sense of professionalism and modernity, since the graphics used in reports are old fashioned, as well as the design and format of the presentations, which hasn't changed in more than 8 years. They also feel some slides are unnecessary, while they would like to have a more in-depth analysis for some variants.

Clients rarely get involved on the methodologies and elaboration of the samplings, since they feel confident with the work the agency does. As they normally hire the service to get information for their own use, results are rarely published, so the agency doesn't get advertising by this way.The company doesn't have a web page or any other digital support.

Wanted

In order to fulfil our mission, GP Mark should be perceived as a 100% taylor made boutique analysis agency, with the hability to perceive our client's needs and even help them to understand them, so we can offer practical solutions and deliver the exact information and analysis needed to make decisions. GP Mark should have a modern image and the highest technology in the field, minimizing human error as much as possible but integrating human insights in every step of the research. Methodologies should offer clear benefits and should stay affordable to our clients.

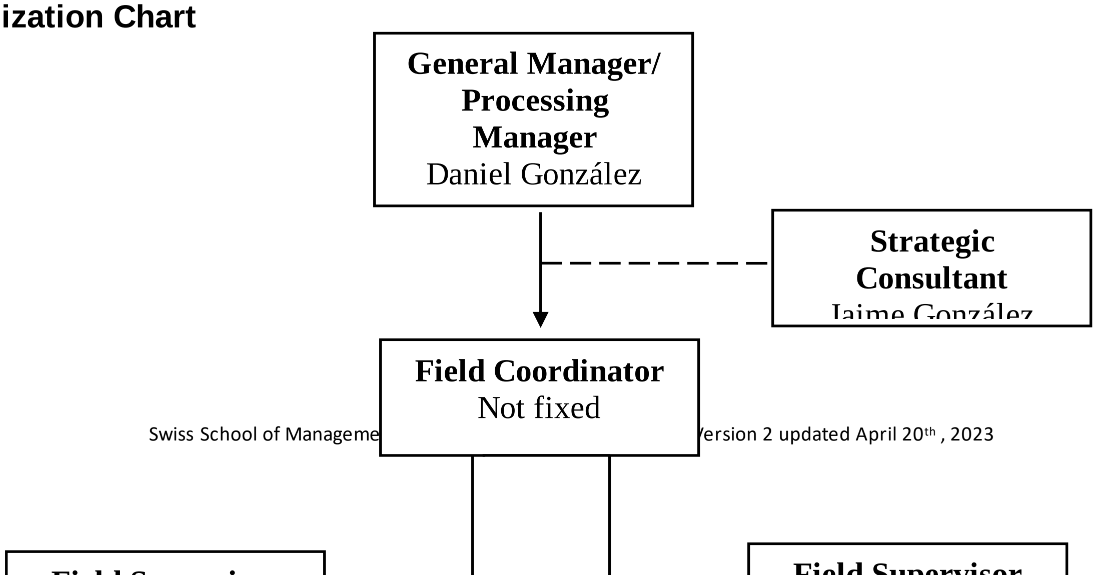
Internal organization- Current

Shareholders

- Daniel González Parás – General Manager
- Ana Laura González Parás - Inactive
- Alejandra González Parás- Inactive
- Mariana González Parás – Legal representative

There are no fixed employees in the company, personnel is hired depending on the project. The General Manager also operates as processing coordinator, handling all the information processing and presentation making by himself.

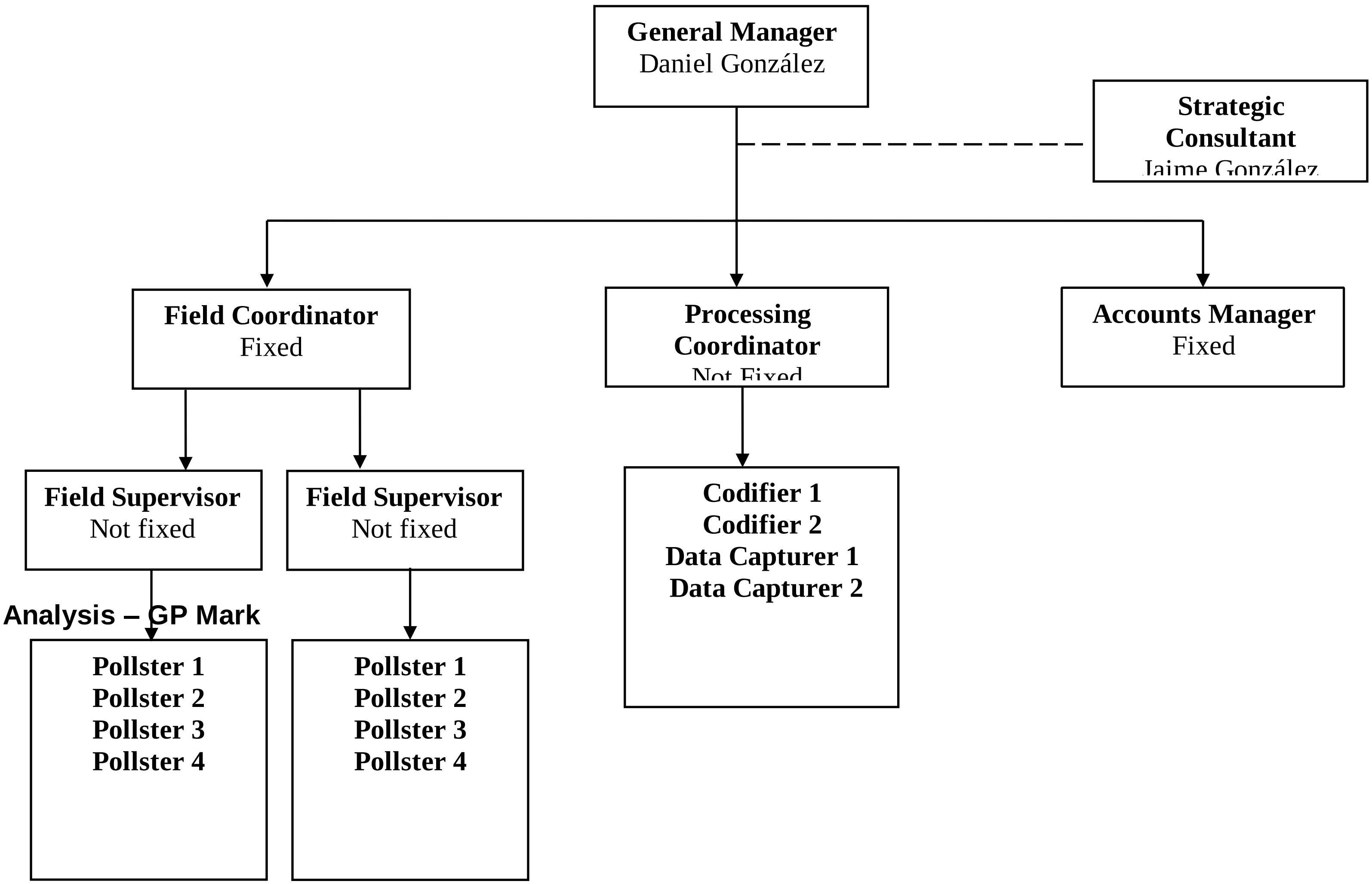
Organization Chart



*For a sample of 400-600 polls

Internal organization- Wanted

Assuming that projects will increase to 10-15 a year, the company should hire at least 2 fixed employees: a field coordinator and an Accounts manager to operate correctly. The processing area should be created, even if employees are not fixed.



SWOT Analysis – GP Mark

Strenghts	**Opportunities**
-The Company has been running for 10 years - no need to start a business from the beggining -Good Company CV- strong clients like Mexico's Presidency -Know-how of founder -Strong on Quantitative Research -Experienced pollsters and supervisors -Strong on giving recomendations on the Political field -Profitable business -Flexibility to client's requests -Deliver results faster than others -Effective methodology on pre-electoral studies	-Most of the companies need Mkting Research - attractive potential market -Availability of information to get certified on the Mexican Mkting Research Association -In the Articles of Incorporation of the company, the Corporate Purpose is very wide, including Research, Advising, Consultory, Training and Development of personal -Better technology to process information available -To expand to other fields rather than political: products, services, etc -Possibility to extend current network on the mkting research industry -Tendency to hire "boutique" agencies rather than big ones
Weaknesses	**Threats**
-Risk avertion of members -Currently working for one client only -Not strong on Qualitative studies -Not certified on the Mexican Mktng Research Association -Lack of future work proposals -Decision-making concentred on the founder -Not getting advertised on any media -Not making PR activities -Too focused in the Political field -Not a constant workload - either too high or too low -There is not a Mision and a Vision Statement	-Our only client does not have a high budget for the next years -A lot of competition: big companies and "boutique" agencies -Quick development of online surveys -Risk on investing the family's wealth -Low-price companies who offer only polls and no analysis -People on the founder's network are getting retired -Getting high debts while using leverage - high interest rates -Mexico's expected growth for 2015 has just reduced to 1.7% - very low

Porter Analysis – GP Mark

Bargaining Power of Suppliers
GP Mark does not work directly with any supplier besides its Accounting agency, which has a low power because it is easy exchangable.
The products they use everyday like paper, ink, computers, etc, are also easy to switch.

Threat of New Entrants
In Mexico, it is hard to stablish any company because of the complicated legal requirements and high sum of money needed to start a new business, so it is a natural barreer for new entrants.
Specifically in Mkting Research, it is not very hard to enter the business itself, but it is hard to be registered on the Mexican Mkting Research Association because there are a lot of certifications to get and a strong supervising of the processes and trustability of results.
GP Mark is not registered yet, but it would be a competitive advantage to achieve it and they would be protected against new entrants.

Rivalry among competitors
Rivalry is at a medium level, because even if there are a lot of competitors and it is difficult to get differenciated when there are not registred methodologies, there aren't too high fixed costs of production, products are not perishable or unique, and there are not high costs of exit.
However, price competition is very common, which makes mandatory to offer added value to the service. On the specific case of GP Mark, it has a good relationship with a competitor who also makes studies to their client, and often work together on projects.

Threat of substitutes
There is a high threat of substitutes on this industry, specially now that GP Mark doesn't have any methology registered. Frequently price is a factor that determines who gets the job, so right now their highest competitive advantage is the personal service they provide to their client and the long time they have worked together.
However, latly they have experienced being substituted when the client gets a better offer from other supplier, so their loyalty is decreasing.

Bargaining Power of Buyers
Is high, mainly because they are currently working for one client only, so all the business depends on them.
Besides, there is a lot of competition and though GP Mark differentiates for their personal service, there is a constant negociation for a lower price.
In Mexico, there is a big culture of satisfying the client's requests, so their power is even greater.

AMAI

The AMAI (Asociación Mexicana de Agencias de Investigación) is the first Mexican Association of Market Intelligence and Public Opinion Agencies with the aim of bringing together the Marketing Research and Public Opinion agencies that fulfill the conditions required by the association, by promoting their skills, experience and professionalism across meetings, conferences, seminars, workshops, research projects, etc. It also acts as an advisor on defending their occupational interests against any governmental or private body.

History

For many years, the reliability of the marketing research agencies was cemented in the public prestige of the company, its professional credentials and the recommendation of its customers. As the industry grew and expanded internationally, it became necessary to develop an accreditation system to ensure the consistency, accuracy and objectivity of the work of researchers.

This is how the AMAI is born on Mexico. It started by conducting a comprehensive review of the quality systems that existed in that time around the world, getting inspiration from documents as the MRQSA from the British Market Research Association.They then decided to build a proper regulatory framework that led to what would later be called Service Standard for Market Research in Mexico: ESIMM®.

Any agency interested on joining the AMAI should follow the standards of the ESIMM. A summary of its most important articles is listed below:

Generalities

The general management of the agency shall provide:
• Quality customer service
• Ensure the development, implementation and continuous improvement of the System of Quality Management.
• Ensure that the System of Quality Management is properly documented.
• Ensure distribution of resources and appropriate information for the system.
• Designate a management representative who has the authority to be responsible of the system and the organization of internal audits that ensure that this standard is being applied.

Procedures of the System of Quality Management

The research provider shall establish and maintain a documented procedure to review and resolve disagreements of the customers. This procedure must consider:
• The identification and registration of the causes of nonconformities.
• The implementation of actions to solve the problems and prevent their recurrence.
• Likewise, it should have a review mechanism by which it is confirmed that these actions were effective in resolving the disagreement

Contracts with Clients

The proposals, quotes and customer contracts should be written down in documents addressed to the client.
When responding to a request from a client, the proposal, quotation or contract should be reviewed by a senior member of the team, to ensure that there are the appropriate and adequate resources to meet the requirements and expectations of the customer.

It is prohibited to use any information (from the material used to the results of the investigation) obtained as a result of carrying out a particular research project, for the purpose of another custumer's project without the proper authorization.

All contracts must contain the price of the research and a project schedule

Planning, Controling and Revision of the Research Activities

The research provider should monitor the most important processes, so that they are conducted in accordance with the agreed specifications. The most important processes include the sampling procedure, the development of the questionnaire or topic guide, data collection, data processing, and analysis and preparationof deliverables.

Purchasing/Outsorcing

The research service provider shall be solely responsible for all services provided as a result of the project, including all activities for which the use of outsourcing is needed.

Training

As skills are the greatest resource of a provider of research services, proper training at all levels (including field workers and part-time) is critical for quality. The research service provider is responsible for ensuring that all the staff is adequately and appropriately trained and has sufficient experience to perform their assigned work.

Regardless of the area to which he or she belongs, everyone entering the company should receive a course of basic introduction, which should contain the following minimum elements:
• Introduction to the company, its staff and administrative procedures.
• The purpose and value of marketing research.
• The importance of ethical interviews and accuracy.
• The Code of Ethics of the AMAI.
• Use of company manuals.
• General Procedures of the System of Quality Management.

Additionally, depending on the functions of the person, the following elements should be included:
• An explanation of the types of research.
• Terminology and jargon of marketing research.
• Sampling methods.
• Demographics, classification and socioeconomic levels.

• How to read questionnaires, discussion guides and registration forms.
• Other issues relevant to the post.

Additional points for field workers:
• Using identity credentials
• Recruitment Methods.
• Control of quotas.
• Kindness while interviewing.
• Interviewing techniques.
• Types of questions, including deep exploration and aided.
• Questionnaires filling.
• The use of visual aids, concepts and products.
• Special interviewing: children, elderly, etc.
• Requirement of confidentiality and anonymity of respondents.
• Letters, thank-you notes and information they can give about the study.
• Role of the supervisor.
• Monitoring progress at work.
• Practical experience in auditing interviews.
• If applicable, the use of computers (eg for CAPI).
• Role-playing and mock interviews (or other methods of data collection).

The specific technical points to each part of the training should be taught by experienced staff, usually the head of the area. The work of a new person should be closely monitored from its admission until the person proves that it is able to meet these specifications.

Problem management

Some mechanisms to control the work and prevent eventual problems arise include:
• Unique identification of works by a key numbering.
• Strict numeration of versions.
• Use of work files.
• Checklists.
• Label and write down explicitly rejected or ready to go documents

Storage of records and materials

Records shall be kept for a minimum period of one year, to serve as a basis for system audits. These records may be in electronic form, taking into account the needs for handling confidential materials. All documents, products and databases that are not required after completion of the research project must be returned to the customer. Clients should be able to access these materials, so the agency should store them for 6 months in paper and 2 years in electronic.
Two clearly identified copies of archived material should be stored in separate locations. A copy muest be saved in a different office or in a safe fireproof place.

Data collecting

Field Force Management

The research service provider shall document and make available the following information relating to the Staff responsible of the data collection (coordinators, supervisors, interviewers, recruiters, auditors and moderators): Skills, previous work experience, level of knowledge (recruitment interviews, forms and applications), as well as details of significant deficiencies found and action taken.

Interviewers should identify themselves with an ID including their name, position, name of the Company, adress and telephone.

All survey team must go accompanied by a field supervisor and he should not have a team of more than five interviewers. Supervisors should be trained and have the necesarry skill and experience to perform their obligations.

Communication with the Field Force should be effective, and there should be evidence of this briefing meetings or calls. At a minimum, this briefing should include:

- Date of fieldwork.
- Methodology.
- Questionnaire discussion guide or record format.
- The fees to be covered.
- Any special requirements of the project.

The research service provider must have a verification mechanism fieldwork in order to ensure compliance with project instructions. The test performed by a third person must be documented and identify the personnel responsible for validating and whose work was validated, the description of deviations found and action taken to resolve them.

Incentives

Incentives to respondants should be used as proof of appreciation and to encourage participation. As part of quality control, the incentive offered to be part of the investigation should be as neutral as possible in terms of the research project and the universe of the study, to ensure that the type and scope of incentives does not generate a bias in responses.

Qualitative work Management

Filter questionnaires or guides to get recruiting participants for focus groups and depth interviews should contain appropriate filter questions to select participants (by telephone, face to face, in a predefined list, a network of hosts, etc.). Those respondents who do not meet the required profile or for those whose identity can not be verified, may not participate in the research,.

A new place must be inspected before being used for the first time, to ensure it is suitable for market research. The only exception is when the convenience of the location is not in doubt, for example hotels and visual laboratories could be excluded.

The information to be filed is:

- Names of recruiters who participated.
- Ratio of number of participants, place, date and time of the session.
- Registration screener guide recruitment and topical guide

Evaluation of Field Workers

The company must have a mechanism for continuous assessment of the work of interviewers, recruiters and auditors for each study:

- Direct supervision in the field.

• Survey or accompanied audit.
• Information obtained in quality review (eg statistics per person for errors and omissions in filling problems or breaches detected, etc.).
• Reports coding or data capture and editing reports per person.
• Feedback from the project executive or supervisory team field.

The validation shall include data confirming the interview, recruitment or equivalent, actually took place and that the instructions were followed; and the duration of the interview and answers to key questions, including demographics and other qualifying questions regarding fees, etc., as well as date and general content or subject of the interview.

This revisits can be performed by any means involving direct communication with the respondent, for example, in person, by phone, by mail or email.

Written questionnaires validation

In all cases it is recommended that a manual review (validation) of at least 5% of all written questionnaires project by individuals properly trained for the task (may include field supervisors). This review should be done prior to data collection or as soon as possible thereafter and shall include the entire questionnaire.

Data Processing Management

The research service provider must have procedures documented to demonstrate that the data capture, codifiyng ,edited and weighted meet the quality standards.

It is necessary to have a systematic method of verifying a minimum percentage of the total data capture work on a project or each stage / wave. The review of data capture should ensure that responses are correct and accurate. In the case of logical data capture (with verification system), the minimum total percentage verification shall be 10% of total.. Capture programs that do not allow entry to invalid responses, forcing capturista resolve this issue at this stage (eg key variables) may be used. If there are gaps in the data, these should be left blank to be handled at the stage of desktop publishing, or identifying them as "no response" in the analysis stage.

Data codifying

The coding of open questions inevitably involves creating frames encoding (and approval by the client when requested), before applying the key to the answers.

To develop the coding frame, a review of some of the questionnaires collected should be performed. This portion must be part of the expected level of eventual response and should be appropriate to the question to derive a full frame coding. It is recommended that questionnaires are used as "representative" as possible to the full study.

When responses are used type "do not know" and "no answer" should be clearly differentiated from one another, as well as the lack of response.

The research service provider should have clear rules or guidelines with respect to handling of responses in the categories "other" or covering several options. If the number of responses in these categories exceeds 10% of the responses will be coded, they must review the responses in order to reduce the size of the group.

Data Editing

Forced editing rules apply for data items that are considered incorrect (eg a multiple response when the question only requires a simple answer), to "force" them to be clean. A report should be prepared to show, even in trial runs, that the forcing has the required effect.
No changes should be made in the data unless there is strong evidence (of the study, or other parts of the given answers). The data should not be assumed or "invented".

Data Reporting
For data reporting the following standards must be followed:
• If data is weighted, then the tables must clearly show unweighted bases and the method of weighting should be noted in appendices or other documentation (eg reports).
• Must show the bases of rows and columns as required.
• If significance tests are made, the tables must show proof and levels of significance in a technical appendix or other documentation (eg reports).
• Definition and clear and complete explanation of all variables used in the analysis of the data, including any significance testing, indexing, scoring, ranking and calculate means, medians, modes and standard deviations.
• Cells of less than 0.5% can be displayed with an asterisk [*] or other symbol always clarification.
• Standard points page breaks / holders must match the questions of origin.
• Information on cell suppression and other measures to ensure confidentiality.
• Warnings unreliable results because the sample size is very small.

Data analysis verification

The quality of all tabs must be reviewed and approved (if applicable) or amended (if an error is detected), the review should include at least:
• Be complete (ie including all tables).
• Ensure that any abbreviation of titles or category of open response accurately reflect the content or essence.
• The base of each table is correct considering no answers or filters, for identifying the actual number of respondents per question.
• The numbers in the subgroups are correct.
• Research blank table (no data).
• Crosses segment tables or breakdowns.
• Review weighting through test tables.
• Review of spelling.
• Readability printing (if paper).
• The frequency counts before making tables, both to ensure the accuracy of the data to determine the basis of the subgroup sizes.
• The base value of each table is correct in relation to other tables or frequency counts.

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