2004 Trippel Survey
An Independent Survey of Corporate Relocation Managers.

Employee Satisfaction

Budd Van Lines

This survey's ranking is different from the prior survey a year ago; Budd changed to the top position.

Corporate Satisfaction

Budd Van Lines

In the prior survey Budd scored the highest – as they did this year.

Keeping Promises & Commitments

Budd Van Lines

Budd was one of only three firms that exceeded the industry average.

Pricing Philosophy & Methodology

Budd Van Lines

Budd easily outscored its closest rival, indicating relocation managers find Budd's pricing methodology most satisfying.

Lowest Number of Complaints

Budd Van Lines

...relocation managers complain half as often about Budd's performance with transferees as they do with other carriers...

SECOND ANNUAL
RELOCATION PROGRAM MANAGERS SURVEY
on the HOUSEHOLD GOODS INDUSTRY
JANUARY 2004

BACKGROUND

Trippel Survey & Research conducted this survey with sponsorship from Applied Materials, Inc. The goal of the survey was to obtain evaluations from corporate relocation managers regarding their level of satisfaction with the household goods carriers they utilize to assist in transferee relocation.

METHODOLOGY

This is the second annual Relocation Managers survey on the HHG industry. Every corporate member listed in the 2003 E-R-C directory moving 25 or more employees received an invitation and a link to the web-survey. (Note: this is not an E-R-C sponsored survey.)

The qualifying companies received one email message with a reminder notice two weeks after the survey's launch. Each recipient was encouraged to provide their company name; there was no way to identify anonymous responses.

The survey was launched December 9, 2003 and closed January 5, 2004. Of the 615 initial invitations sent via email 47 were undeliverable. Consequently, 568 invitations reached the intended recipient. From this population 140 responses were received, a 25% response rate.

E-R-C listed companies receiving invitation	615
Companies with an undeliverable email address	47
Net, recipients receiving invitation to participate	568
Responses received	140

Survey responses are presented as reported by *Zoomerang*, the web-survey service firm used in this endeavor. When appropriate, comments are made in this report supporting the survey responses. Many of the comments compare results of this survey to the similar HHG survey of late 2002.

CONFIDENTIALITY

Only firms participating in the survey receive this free complementary report. Trippel Survey & Research maintains strict confidentiality of the corporations who participated. Please do not distribute the report to any person outside your company.

SURVEY RESPONDENT PROFILE

From the survey sampling of 140 responses, 134 firms identified themselves, 6 remained anonymous.

When asked the range of volume of the domestic transfers over the past year respondents provided this profile:

RANGE OF MOVES	NUMBER RESPONDENTS	RESPONDING PERCENTAGE	*E-R-C % DISTRIB.*
1 – 50	21	15%	*18%*
51 – 100	26	18	*18*
101 – 250	30	22	*28*
251 – 500	33	24	*18*
501 – 1000	12	9	*9*
over 1000	18	13	*9*
TOTAL	*140*	*100%*	*100%*

The survey response profile correlates well to the distribution of E-R-C members (right column, italics above) meeting the same size criteria.

SURVEY RESULTS

YOUR COMPANY & DOMESTIC VOLUME

The first question asked the respondents to give their company name. These names will remain confidential. Question 2 asked the respondents to state their domestic annual move range. The results are detailed above. Over two-thirds of the respondents move over 100 domestic employees per year.

When appropriate, comments are made in this report supporting the survey responses. Many of the comments compare results of this survey to the similar survey of late 2002.

ADMINISTRATION OF HOUSEHOLD GOODS SHIPMENT

The next five questions addressed administrative aspects of carrier selection: who chooses which carriers go on the approved list, who negotiates fees, how often do firms go out to bid or update their supplier lists, who chooses which carrier an employee uses for a transfer, and what criteria is used to make that choice. The following charts show the frequency of answers to the five questions.

Question #3 – "Who chooses which van line is put on your approved list?

Choices	percent of 140 responses
Your relocation department	73%
Your traffic department	8
Your procurement department	6
Another corporate administrative department	1
Your "third-party" relocation service provider	13
Other:	11
Collaborative effort = 9%	

Comment: In the first survey conducted late 2002, over 20% of the respondents stated the relocation service provider chose the HHG firms. This percentage has fallen to 13%. This entire 7-point percentage change was picked up by "relocation department." More relocation departments are taking the van line choice back in-house, rather than giving the responsibility to external firms.

Question #4 – "Who negotiates fees, rates and programs with the van lines?"

Choices	percent of 140 responses
Your relocation department	61%
Your traffic department	9
Your procurement department	24
Another corporate administrative department	2
Your "third-party" relocation service provider	17
Other	8
Collaborative effort = 4%	

Comment: In the first survey, 24% of the respondents stated the relocation service provider negotiated rates and fees with the HHG firms. This percentage has fallen to 17%. The seven-point drop was picked up by the "relocation department." More relocation departments are conducting rate negotiation directly with the van line, rather than giving the accountability to relocation service firms.

Question #5 – "If you negotiate, how often do you go out to bid on the HHG business?"

Choices	percent of 140 responses
Regularly every year	1%
Regularly every 1 to 2 years	4

Regularly every 2 years or more	29%
Whenever performance dictates	51
Whenever other non-performance factor dictates	15

Comment: Slightly more than one-half respondents review and possibly select another carrier whenever performance of an existing carrier dictates. Conversely, one-third of the firms review and update carrier contracts as a function of elapsed time. This question was not asked on the prior survey.

Question #6 – "If there is more than one van line on your list, who chooses which van line the transferred employee uses in the transfer?"

Choices	percent of 140 responses
Employee choice	14%
Your relocation department	55
Your traffic department	4
Another corporate administrative department	0
Your "third-party" relocation service provider	23
Other	14
"Fifty-fifty" or only one supplier = 10%	
VIPs use one carrier, all others split = 3%	

Comment: In the first survey, 22% of the respondents stated the employee selected which HHG firm would be used. This percentage has fallen to 14% - a significant reduction! The entire change in selection was picked up by the "relocation department," which increased from 47% in the prior survey to 55% in this survey. More relocation departments are choosing van line selection rather than offering employee choice. Furthermore, only 23% of relocation service firms now make the choice compared to 27% in the 2002 survey. This trend is consistent with a few of the "gripes" stated by respondents at the end of the survey (question #23).

Question #7 – "If there is more than one van line on your approved list, what criteria is used to select which carrier to use on a particular move?"

Choices	percent of 140 responses
Based on fee/ price or discount rate	16%
Based on departure location	20
Based on destination location	13
Based on the department or group the employee belongs to	1
Based on alternate choice (promote equal volume)	44

Based on past carrier performance	27
I am not sure how the choice is made	6
Other criteria used	14

Comment: The primary method used to select a carrier for a move is based on a philosophy of equal volume. The responses to this question show a significant degree of change compared to the prior survey. In the first survey, 22% of the respondents stated fee/price/discount rate was the criteria. This percentage has fallen to 16% - a significant reduction! A more significant change in criteria is the percentage of respondents saying departure location is the criteria. This has fallen from 47% to 20%. In addition, a similar percentage change is the criteria identified as "alternating volume." This criteria method increase from 27% in 2002 to 44% in this current survey.

CARRIER UTILIZATION

Survey question #8 asked respondents to estimate the percentage of moves (i.e. volume) the carriers on the approved list receive. The results indicate most responding companies split their business among two or more carriers. The average number of carriers, per each of the 140 companies, was 3.2 carriers on the approved list. This is down from the 3.4 carriers in the 2002 survey. Conclusion: relocation managers rely on fewer carriers to move employees than a year ago.

The largest share of business is United Van Lines with 80 contracts, or 57% contract share among the 140 companies in the survey. Although the largest carrier, for United this contract share is down 8 percentage points from the 2002 survey.

The following chart shows the carriers' rank based on number of contracts. Percentage share exceeds 100% because most firms have multiple contracts. In this calculation, "percentage share" represents the percentage of responding clients using that carrier.

Carrier	Number Contracts	Percentage share	Last year's survey percentage share
1. United	80	57%	65%
2. Atlas	66	49	48
3. Allied	49	36	41
4. Graebel	46	34	36
5. Mayflower	24	17	12

6. Budd	22	16%	15%
7. Clark & Reid	21	15	18
8. Paul Arpin	20	14	14
9. New World	17	12	14
10. A. Arnold	15	11	13
11. Bekins	14	10	8
12. Crown	13	9	N/A
13. Victory	13	9	8
14. Covan	11	7	8
15. Wheaton	8	6	14
16. All others	21	15	17

AVERAGE 3.2 Carriers per respondent in 2003
3.4 Carriers per respondent in 2002

Most responding companies have three or four carriers on their approved lists. Further analysis of the survey results reveal

- When two carriers are on the list, the usual distribution is approximately equal share to each (ex: 55:45). This is the same dynamic as the last survey.
- When three carriers are on the list, the usual distribution is two carriers share a large percentage fairly equally and the third firm has a small token volume (ex: 45:45:10). This is the same dynamic as the last survey.
- When four carriers are on the list, the usual distribution is one carrier has a majority, two have approximately equal share, and the forth firm near zero (ex: 50:25:25:0). This is the same dynamic as the last survey.
- Thirty firms in this survey (of 140) have only one carrier. Of this segment, United has the largest number of single-supplier contracts with 14. Most often it is the company with the low volume who has the single carrier contract.

Comment: United Van Lines remains the carrier with the largest contract-share, yet the percentage of firms using United is lower than the 2002 survey. Three of the top four (United, Allied and Graebel) lost market share. Few firms realized significant gains in contract share; Mayflower showed the largest increase in share. Most firms stayed +/- 1 point from 2002.

EMPLOYEE (TRANSFEREE) SATISFACTION

Question #9 asked respondents to evaluate, from their perspective, the level of customer (the transferred employee) satisfaction each firm achieves when handling a move. A ten-point scale was used with ten the highest score, one the lowest. The survey respondents' scores generated an industry wide average of 8.01 (of ten highest). This average satisfaction score is higher than last year's 7.71 average.

The 140 firms evaluated many of the largest carriers in employee satisfaction. Yet only these nine firms are shown because they each have 20 or more respondents providing a satisfaction score. All other carriers had 15 or fewer respondents answering in the survey. It is believed these smaller sample sizes are too small to validate customer satisfaction. The nine largest carriers' scores shown below should be used to compare one to another.

Carrier	Aver. Score	Rank	# Respondents
Budd	9.00 (of 10)	1	23
Clark & Reid	8.91	2	21
Graebel	8.25	3	47
New World	8.14	4	20
Atlas	8.00	5	68
United	7.75	6	80
Mayflower	7.63	7	24
Allied	7.62	8	50
Paul Arpin	7.58	9	20
AVERAGE SCORE ALL CARRIERS	8.01		

As stated earlier, this industry average is higher than last year.

Only four of these nine firms exceeded the industry average: Budd, Clark & Reid, Graebel and New World.

Comment: This survey's ranking is different from the prior survey a year ago; Budd and Clark & Reid changed the top two positions. Further these two firms scored significantly higher than competitors.

The top three firms improved their satisfaction score compared to the prior survey. Three other firms show slightly higher scores in this survey compared to the prior survey: Atlas, United and Allied.

RELOCATION MANAGER NEEDS

Question #10 asked "What needs do you have of the van line carrier on the approved list?" Respondents were given a list of needs to choose from, plus an opportunity to define any other need. Multiple answers were allowed with a maximum of three choices, each answer was ranked in order of importance.

The first chart shows the seven needs ranked by total responses provided by the 140 respondents; each respondent could select three needs.

Need	Responses
Maximizing overall employee satisfaction	71 responses
Meeting moving schedule	50
Minimizing the cost of the HHG program	48
Minimizing claims frequency	40
Minimizing employee complaints	34
Minimizing claims cost	40
Minimizing billing and reporting errors	21

Comment: This year's survey indicates "Maximizing employee satisfaction" is the most important need a relocation manager has. This is the same outcome as last year's survey. However, this year's survey indicates a significant great number of respondents chose "minimizing HHG costs" as the third the most important need. In the prior survey this need earned the fifth highest score. With quality improving in this industry relocation managers, needs reflect an increase in cost focus.

CLIENT SATISFACTION

Question #11 asked respondents to evaluate their corporate satisfaction with the carriers. Again, a ten-point scale was used with ten the highest score and one the lowest score. Whereas question #8 dealt with employee satisfaction from the respondents' perspective, this question dealt with relocation managers' satisfaction with the van lines.

The following chart shows the carriers' rank of corporate relocation manager satisfaction (showing the 9 largest carriers only).

Carrier	Aver. Score	Rank	# respondents
Budd	9.00 (of 10)	1	18
Clark & Reid	8.80	2	18
New World	8.71	3	13
Graebel	8.48	4	41

Atlas	8.24 score	5 rank	63 responses
United	8.04	6	72
Mayflower	7.88	7	14
Allied	7.54	8	40
Paul Arpin	<u>6.71</u>	<u>9</u>	<u>11</u>
AVERAGE SCORE ALL CARRIERS	8.18		

In the 2002 survey, this question scored 7.55. Relocation managers believe carriers are doing a <u>better</u> performance job this year in meeting their needs versus last year.

Five of these nine firms exceeded the industry average: Budd, Clark & Reid, New World, Graebel and Atlas.

Comment: This survey's ranking is much different from the prior survey a year ago. In the prior survey Budd scored the highest – as they did this year. Following Budd, the entire sequence changed order. Clark & Reid jumped from fourth highest to second highest this year. New World dropped from second to third, Graebel climbed from ninth to fourth, Atlas climbed from seventh to fifth, United improved from eighth to sixth, Mayflower dropped from third to seventh, Allied improved one position from ninth to eighth and finally Paul Arpin dropped from sixth to ninth.

Of the top four firms, Clark & Reid, New World and Graebel improved their satisfaction score compared to the prior survey. Mayflower and Paul Arpin scored lower this year compared to last year.

<u>GREATEST REPUTATION FOR OVERALL QUALITY OF SERVICE TO THE CUSTOMER</u>

The next question, number #12, asked respondents to select one firm (only) they believe has the greatest reputation for quality service to the transferred employee. There were 122 responses and the carriers with the most "nominations" were:

Carrier	Nominations
United	21
Atlas	20
Allied	18
Budd	15
Clark & Reid	14
Graebel	13

Comment: There is inconsistency between the firms earning the highest satisfaction scores (question #9) in providing quality service to the employee and the reputation firms have in this industry. Budd, Clark & Reid and Graebel outscored the competitors in the quality service question, yet scored lower in reputation than three firms (United, Atlas, Allied) which had lower satisfaction scores in question #9.

Furthermore, Clark & Reid and Budd earned the two highest scores in the 2003 transferee survey (see: *Nationwide Relocating Employee Survey©* results provided by Trippel Survey & Research) which reinforces what relocation managers believe to be the two best quality service providers. Yet, reputation of quality does not match reality of quality.

KEEPING PROMISES AND COMMITMENTS

Question 13 discussed relocation managers' view of carriers' keeping promises and commitments. Responding relocation managers could rate their satisfaction on the ten-point scale for the carriers they use.

The following chart shows the carriers' rank of keeping promises and commitments (showing the 9 largest carriers only).

Carrier	Aver. Score	Rank	# responses
Clark & Reid	9.00 (of 10)	1	19
Budd	9.00	1	18
New World	8.83	3	13
Atlas	8.24	4	51
Graebel	8.64	5	39
United	8.04	6	68
Mayflower	7.88	7	15
Allied	7.54	8	41
Paul Arpin	6.71	9	13
AVERAGE SCORE ALL CARRIERS	8.53		

Only three of these nine firms exceeded the industry average: Clark & Reid, Budd and New World.

Comment: This question was not asked in the prior year's survey, therefore no comparison is available.

LEVEL OF PROFESSIONALISM AND EXPERIENCE OF CARRIER'S PERSONNEL

Question #14 discussed relocation managers' view of the level of professionalism and experience of the carriers' personnel. Responding relocation managers could rate their satisfaction on the ten-point scale for the carriers they use.

The following chart shows the carriers' rank on this attribute (showing the 9 largest carriers only).

Carrier	Aver. Score	Rank	# responses
Clark & Reid	9.27 (of 10)	1	21
Budd	9.00	2	17
New World	8.75	3	15
Atlas	8.68	4	63
Graebel	8.61	5	42
Mayflower	7.88	6	14
United	8.04	7	71
Allied	7.79	8	42
Paul Arpin	7.67	9	12
AVERAGE SCORE ALL CARRIERS	8.48		

Five of the nine firms exceeded the industry average: Clark & Reid, Budd, New World, Atlas and Graebel.

Comment: This question was not asked in the prior year's survey, therefore no comparison is available.

CARRIER'S CLAIM FUNCTION AND PROCESSING OF CLAIMS

Question #15 discussed relocation managers' view of the carrier's claim function and the processing of employee claims. Responding relocation managers could rate their satisfaction on the ten-point scale for the carriers they use.

The following chart shows the carriers' rank on this attribute (showing the 9 largest carriers only).

Carrier	Aver. Score	Rank	# responses
Clark & Reid	9.00 (of 10)	1	21
New World	8.95	2	15
Budd	8.67	3	17
Atlas	8.51	4	63
Graebel	8.46	5	42
Mayflower	8.25	6	14
United	7.93	7	71
Allied	7.68	8	42
Paul Arpin	6.40	9	12
AVERAGE SCORE ALL CARRIERS	8.23		

Six of the nine firms exceeded the industry average: Clark & Reid, Budd, New World, Atlas, Graebel and Mayflower.

Comment: This question was not asked in the prior year's survey, therefore no comparison is available.

CARRIER'S WEB-BASED TOOLS AVAILABLE TO RELOCATION MANAGER AND EMPLOYEE

Question #16 discussed relocation managers' view of the carrier's web-based technologies available for use by the employees and relocation managers alike. Responding relocation managers could rate their satisfaction on the ten-point scale for the carriers they use.

The following chart shows the carriers' rank on this attribute (showing the 9 largest carriers only).

Carrier	Aver. Score	Rank	# responses
Mayflower	7.60 (of 10)	1	10
Graebel	6.78	2	37
New World	6.67	3	12
Budd	6.60	4	11
Paul Arpin	6.50	5	11
United	6.38	6	67
Allied	6.26	7	35
Atlas	5.72	8	47
Clark & Reid	4.38	9	13

AVERAGE SCORE ALL CARRIERS = 6.17

Comment: Of all the questions asked in this survey, this question earned the lowest scores by responding relocation managers. Although many firms scored above the industry average score, the 6.17 average is dismal, easily indicating dissatisfaction among relocation managers. Smaller carriers had very low scores which further contributed to this dreadful score.

Note also how few relocation managers answered this question. Many commented they did not use or knew about their carrier's web capabilities and chose not to answer the question.

This question was not asked in the prior year's survey, therefore no comparison is available.

CARRIER'S PRICING PHILOSOPHY AND METHODOLOGY

Question #17 discussed relocation managers' view of the carrier's pricing methodology and philosophy. Responding relocation managers could rate their satisfaction on the ten-point scale for the carriers they use.

The following chart shows the carriers' rank on this attribute (showing the 9 largest carriers only).

Carrier	Aver. Score	Rank	# responses
Budd	8.80 (of 10)	1	17
Mayflower	8.17	2	14
United	7.89	3	71
Allied	7.77	4	42
Atlas	7.77	4	63
Graebel	7.64	6	42
New World	7.20	7	15
Clark & Reid	6.86	8	21
Paul Arpin	6.67	9	12
AVERAGE SCORE ALL CARRIERS	7.80		

Comment: Of all the questions asked in this survey, this question earned the second lowest average score by responding relocation managers. Budd easily outscored its closest rival Mayflower indicating relocation managers find Budd's pricing methodology most satisfying.

This question was not asked in the prior year's survey, therefore no comparison is available.

TASKS GENERATING MOST EMPLOYEE/CUSTOMER COMPLAINTS

Question #18 asked relocation managers' to evaluate which areas of performance the carriers' generate the most transferred employee complaints. Obviously, the largest carriers United, Atlas and Allied would receive the most complaints based on their market share. Accordingly, adjustments were made to allow for volume weighting by taking the number of contracts into consideration.

The following chart shows the carriers' rank as a function of "transferee complaints per client contract" – the lower the ratio the better the performance.

Carrier	Aver. Score	Rank	#complaints
Budd	0.27	1	9
Clark & Reid	0.29	2	9
Mayflower	0.33	3	12
New World	0.35	4	9
Allied	0.47	5	35
Paul Arpin	0.52	6	9
United	0.53	7	59
Graebel	0.54	8	38
Atlas	0.55	9	54
AVERAGE SCORE ALL CARRIERS	0.44		

Comment: This ranking indicates the relative number of complaints relocation managers have with the carrier's they use as a function of the number of survey respondents and the respective share of the business. The lower the ratio the fewer complaints the relocation manager has for that carrier. The value of the chart is intended in comparing one carrier to another. For example, relocation managers complain half as often about Budd's performance with transferees as they do Atlas' performance with transferees (after allowing for volume differences).

Not surprisingly, based on question 9 and 11 responses, Budd and Clark & Reid earned the lowest ratios indicating the most favorable complaint ratio.

This question was not asked in the prior year's survey, therefore no comparison is available.

What are some of the most predominant complaints relocation managers have of the carriers' performance with transferees? The following chart reveals the perception of relocation managers of carriers' dominant customer-servicing weaknesses as reported by the 140 respondents.

Carrier	Weakness(es)
Budd	Damage-loss
Clark & Reid	Damage-loss
Mayflower	On-time arrival at destination; Damage-loss
New World	Damage-loss
Allied	Damage-loss; customer & client servicing
Paul Arpin	Damage-loss
United	Damage-loss; packing process; on time arrival at destination
Graebel	Damage-loss; customer & client servicing; crew behaviors; on-time arrival at departure location
Atlas	Damage-loss; customer & client servicing; packing processes

GROUP MOVE PRICING DISCOUNTS

Respondents answered question #19 on discounts for group moves. Seventy percent (70%) of the respondents said their carrier(s) do NOT provide discounts for a group move of any size.

AUDITING OF HHG BILLS

Question number 20 was on the topic of auditing of bills. The following chart indicates the varied responses provided in this survey.

Method of audit (if any)	% of respondents
No audit of bills is performed	19%
Yes, the carrier performs the audit	9
Yes, our in-house staff does the audit	21
Yes, our relocation service provider does the audit	26
Yes, an independent outside firm does the audit …	
Performed by Move Management	4
Performed by Audit Solutions	5
Performed by Parsifal	5
Performed by Infinity	5
Performed by some other outside firm	6

Comment: Most respondents have either an independent outside firm (25% of respondents) or their relocation service provider (26%) audit bills, or their in-house audit department/function (21%).

Within this survey sampling, no independent firm has a dominant market share.

SATISFACTION WITH THE AUDIT QUALITY

In this survey, 73% of respondents answered question #21 regarding satisfaction with the audit activity with one of the three highest scores of 8, 9 or 10.

Highest satisfaction scores were earned by Audit Solutions, Infinity and whichever relocation service provider that relocation manager uses.

DIRECT PAYMENT OF CLAIMS TO CUSTOMER WITHOUT CLAIM PROCESSING PROCEDURE

Question #22 asked whether the carrier has a policy (practice) of paying "small" claims directly to the customer bypassing the arduous process of claim processing. Such payments are often paid by the driver directly. Such a practice has many benefits to the carrier and driver.

Within this survey, 49% of respondents were not sure whether their carrier followed this practice. An additional 37% of the respondents were aware of this practice and knew the dollar limit imposed by the carrier. The dollar limit varied from under $100 (8% of respondents), under $250 (15%), under $500 (13%) or under $1000 (1%).

SINGLE BIGGEST GRIPE WITH HHG INDUSTRY

Question #23 generated many expressions of frustration. This question asked the respondents to state "the single biggest gripe … with the HHG industry." Nearly 80% of the respondents took the time to type an answer to this open-ended question. There were 111 gripes (one per person) submitted).

There were many different statements but there was a pattern of statements falling into four categories. The categories and a sampling of respondents' statements follow.

A. Pricing/Fees/Billing (49 gripes of 111 submitted)

- They are pushing Tariff 400N down our throats (multiple gripes on Tariff 400n and 400M),

- Lack of clarity in the billing process,
- Pricing up little extras (multiple examples),
- Ridiculous deep discounts or pricing structures,
- Dishonest pricing methods, poor accountability, pricing to open to manipulation, complexity
- Padding by the third-party companies,
- Too much hocus-pocus,

B. Quality & Staff

- They need to raise the bar in execution to become professional,
- Claims processing and outcomes,
- Need excellent drivers, turnover of crews, quality of packers,
- Need committed crews for the entire move,
- Internal communications within the carrier,
- Timeliness,
- Better sales reps who know the industry,
- Too many people involved.

C. Communications

- Call the customer more often,
- All parties: customer, third party and HHG need to talk more,
- They do not listen to the customer,
- They do not give a straight answer,
- Too many "grey" areas.

D. Technology

- No or few reports on a regular basis,
- Little or no technology tracking for customers.

NEW SERVICES CARRIERS CAN PERFORM

The final question, number 24, asked for thoughts on new services "perform for you or your employees?"

Nearly one-third of the respondents provided a typed answer to this question. Many were directed towards Alan Trippel and the survey program or clarifying certain answers. However, within the context of the HHG industry, the single biggest and most prevalent "new service" is not so new, but a plea for implementation. That is use of technology – web based application for the relocation manager and the transferred employee.

Twenty four respondents (of the 65 providing typed answers) requested improvement in technology applications. This answer is very consistent with the low scores carriers received in question 16.

Other recommendations were grouped into services for free, or services for company employees moving but not part of a company sponsored move.