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工商管理经典教材·核心课系列

Administration Classics

商业研究方法

BUSINESS RESEARCH

(第9版)

METHODS

(Ninth Edition)

唐纳德·R·库珀 (Donald R. Cooper)
[美] 帕梅拉·S·欣德勒 (Pamela S. Schindler) 著
孙健敏 改编



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总 序

随着我国加入 WTO,越来越多的国内企业参与到国际竞争中来,用国际上通用的语言思考、工作、交流的能力也越来越受到重视。这样一种能力也成为我国各类人才参与竞争的一种有效工具。国家教育机构、各类院校以及一些主要的教材出版单位一直在思考,如何顺应这一发展潮流,推动各层次人员通过学习来获取这种能力。双语教学就是这种背景下的一种尝试。

双语教学在我国主要指汉语和国际通用的英语教学。事实上,双语教学在我国教育界已经不是一个陌生的词汇了,以双语教学为主的科研课题也已列入国家“十五”规划的重点课题。但从另一方面来看,双语教学从其诞生的那天起就被包围在人们的赞成与反对声中。如今,依然是有人赞成有人反对,但不论是赞成居多还是反对占上,双语教学的规模和影响都在原有的基础上不断扩大,且呈大发展之势。一些率先进行双语教学的院校在实践中积累了经验,不断加以改进;一些待进入者也在模仿中学习,并静待时机成熟时加入这一行列。由于我国长期缺乏讲第二语言(包括英语)的环境,开展双语教学面临特殊的困难,因此,选用合适的教材就成为双语教学成功与否的一个重要问题。我们认为,双语教学从一开始就应该使用原版的各类学科的教材,而不是由本土教师自编的教材,从而可以避免中国式英语问题,保证语言的原汁原味。各院校除应执行国家颁布的教学大纲和课程标准外,还应根据双语教学的特点和需要,适当调整教学课时的设置,合理选择优秀的、合适的双语教材。

顺应这样一种大的教育发展趋势,中国人民大学出版社同众多国际知名的大出版公司,如麦格劳-希尔出版公司、培生教育出版公司等合作,面向大学本科生层次,遴选了一批国外最优秀的管理类原版教材,涉及专业基础课,人力资源管理、市场营销及国际化管理等专业方向课,并广泛听取有着丰富的双语一线教学经验的教师的建议和意见,对原版教材进行了适当的改编,删减了一些不适合我国国情和不适合教学的内容;另一方面,根据教育部对双语教学教材篇幅合理、定价低的要求,我们更是努力区别于目前市场上形形色色的各类英文版、英文影印版的大部头,将目标受众锁定在大学本科生层次。本套教材尤其突出了以下一些特点:

- 保持英文原版教材的特色。本套双语教材根据国内教学实际需要,对原书进行了一定的改编,主要是删减了一些不适合教学以及不符合我国国情的内容,但在体系结构和内容特色方面都保持了原版教材的风貌。专家们的认真改编和审定,使本套教材既保持了学术上的完整性,又贴近中国实际;既方便教师教学,又方便学生理解和掌握。

- 突出管理类专业教材的实用性。本套教材既强调学术的基础性,又兼顾应用的广泛性;既侧重让学生掌握基本的理论知识、专业术语和专业表达方式,又考虑到教材和管理实践的紧密结合,有助于学生形成专业的思维能力,培养实际的管理技能。

- 体系经过精心组织。本套教材在体系架构上充分考虑到当前我国在本科教育阶段推广双语教学的进度安排,首先针对那些课程内容国际化程度较高的学科进行双语教材开发,在其专业模块内精心选择各专业教材。这种安排既有利于我国教师摸索双语教学的经验,使得双语教学贴近现实教学的需要;也有利于我们收集关于双语教学教材的建议,更好地推出后续的双语教材及教辅材料。

- 篇幅合理,价格相对较低。为适应国内双语教学内容和课时上的实际需要,本套教材进行了一定的删减和改编,使总体篇幅更为合理;而采取低定价,则充分考虑到学生实际的购买能力,从而使本套教材得以真正走近广大读者。

- 提供强大的教学支持。依托国际大出版公司的力量,本套教材为教师提供了配套的教辅材料,如

教师手册、PowerPoint 讲义、试题库等，并配有内容极为丰富的网络资源，从而使教学更为便利。

本套教材是在双语教学教材出版方面的一种尝试。我们在选书、改编及出版的过程中得到了国内许多高校的专家、教师的支持和指导，在此深表谢意。同时，为使我们后续推出的教材更适于教学，我们也真诚地期待广大读者提出宝贵的意见和建议。需要说明的是，尽管我们在改编的过程中已加以注意，但由于各教材的作者所处的政治、经济和文化背景不同，书中内容仍可能有不妥之处，望读者在阅读时注意比较和甄别。

徐二明

中国人民大学商学院

改编者的话

Business Research Methods 是一本非常实用的关于管理学研究方法的教科书。1998 年我在美国访问时，注意到很多著名大学的商学院给 MBA 学生开设研究方法课，使用的都是这本教材。当时是 1995 年的第五版，我看过之后爱不释手，于是买了一本带回国内，开始用双语给研究生讲授管理研究方法。近十年过去了，国内关于管理研究的气候已经形成，尽管称呼还不一样（大家直接把书名翻译为企业研究方法或商业研究方法，实际上应该是管理学研究方法）。

在这样的时候再出这本书的英文改编版，是否还有必要？

答案是肯定的。理由有四。

首先，这是一本针对管理领域研究生水平的研究方法教科书。其定位清晰，内容的针对性强，特别是关于研究过程的解释和描述，具有自己的特点。

其次，内容难度适中。既有对科学研究的基本概念的解释和说明，也有对高级统计分析的简单介绍，使读者拥有自己的选择余地，教师也可以根据学生的特点进行取舍。

再次，实用性强。本教科书密切结合企业实际，通过大量的实例和练习，把所讲解的内容和概念与企业实际结合起来，让读者充分感受科学研究在实际工作中的重要性。特别是每一章开始的实例，是一个贯穿全书的真实故事，以此来注解研究方法在企业实际中的应用，非常巧妙。

最后，国内一般人对科学研究方法的理解往往停留在肤浅的表层。大多数人一听说研究方法，想到的就是象牙塔里使用的东西，与企业管理或其他领域的实践没有什么关系，所以一般人不需要学。这实在是偏见。我认为，科学研究方法要教给我们的，绝不仅仅是具体的方法，更重要的是一种思维方式，一种实事求是的精神和态度。这种思维方式的核心是：任何判断或结论都必须有事实依据或数据！这种实事求是的精神是：对客观事物，包括我们自己，不能仅靠直觉经验，应该借助科学的方法去认识和理解。

基于上述原因，我认为这本改编的英文版《商业研究方法》（第 9 版），在国内具有不可替代的地位和作用。

本书的改编主要是压缩了三部分内容：一是插图，全书大概有上百幅黑白和彩色插图，在改编版中都看不到了；二是某些章后的附录；三是一部分网上练习和不适合我国国情的内容。

改编后的版本精炼了很多，对中国学生来说买书的负担也就小了些，但原版书的基本框架和内容没有作任何改动。

孙健敏

于人民大学求是楼

>preface*

Business Research Methods is designed to share the stimulating, challenging, fascinating, and sometimes frustrating world of research-supported decision making with undergraduate students preparing to be future managers. We have used our research and teaching experience and our numerous research industry contacts to create a textbook full of practical examples and researcher insights. For undergraduate students just learning about research methods or graduate students advancing their research knowledge, with each new edition *Business Research Methods* promises—and delivers—not only a teachable textbook but a valued reference for the future.

Four words summarize the changes made to this ninth edition of *Business Research Methods*—**expanded, reorganized, new, and collaboration**. You'll be happy to see that we've made these changes while keeping all those features on which you have come to rely—great coverage of the research process, especially the clarification of the research problem; great coverage of ethical issues; great coverage of survey research; and great coverage of research reporting.

What's Expanded?

Coverage of Qualitative Research You'll find a new chapter in *Business Research Methods*—"Qualitative Research." For several years research practitioners have been exhibiting increasing interest in qualitative research methodologies. In their search for insights, they are using these qualitative techniques more frequently. These tools took a back seat to the quantitative ones during the last 20 years, which may explain why many of our students think *research* is synonymous with *survey*. To correct this misconception, we've given students the "what and why" of numerous qualitative techniques in Chapter 8. Here we've expanded our coverage of the focus group (as it is the most frequently used qualitative technique), and we've also presented a rich array of other techniques being used. You'll notice that our Snapshots and cases also reveal an increasing use of qualitative techniques. And we've given students something most have never seen: a focus group discussion guide. Now you and your students can see how a 25-year veteran moderator structures a focus group. It's in Appendix A.

Process Series of Exhibits The core pedagogy of *Business Research Methods* is based on an understanding that students learn both verbally and visually. Our process series of exhibits has been expanded to cover every aspect of the research process. These exhibits offer an overview of a process or a more detailed breakout of a subprocess. And

each exhibit is linked to the others in the series with a consistency in use of shape and color. In all, three new exhibits have joined this series, and many of the others have been refined to make the research process easier to understand. You'll now find 31 of these exhibits throughout the text.

Coverage of Research Industry Structure

Reviewers told us that many of their students won't ever do actual research themselves but will be more likely to hire specialists and need to supervise the process. As a result, we've added a section to Chapter 1 that describes how the research industry is structured and how research specialists work together to accomplish projects.

Coverage of Request for Proposals If students become managers who hire out research projects, then they need to know more about how such projects are put out for bid. Thus, we've expanded our coverage of the request for proposal—the RFP—including a complete RFP developed for an Ogilvy Research Award-winning project. By following the *Covering Kids* project from RFP, through the various Snapshots, the written case, and the video case, your students will fully understand the process so critical to quality research.

Coverage of Test Markets The most notable experiment in business research is the test market. We've added a section to Chapter 11 to give it the attention that this frequently used methodology deserves.

What's Reorganized?

Different Chapter Order You might first notice a different order of chapters. When we added Chapter 8, we asked reviewers to describe the order in which they cover material and the level at which they cover that material. This made us rethink the order of the chapters. The most notable changes are the "Secondary Data Searches" chapter—it has moved forward—and "Sampling," which we've moved to a later position. Both of these chapters are stand-alone chapters, however, that can be moved earlier or later depending on your particular teaching model. Our overview of data mining has also moved, to coincide with the observation methodology known as record analysis in Chapter 9.

Several Chapter Appendices Our reviewers all teach their research methods courses different ways. They cover the material in different order. Some cover material that others ignore. Their suggestions resulted in our

* 本前言中提到的部分内容在改编时已作了精简,但为了便于读者了解原书概貌,未作改动,保留原貌。——改编者注

pulling into a free-standing chapter appendix some material previously embedded in the chapter. This will facilitate the process of using—or not using—the material in your specific course. Chapter appendices include the sample RFP on the *Covering Kids* project, complex experimental designs, crafting questions for questionnaires, calculating sample size, the pretesting of questions and questionnaires, and describing data statistically.

Clearer Writing within Each Chapter With a three-year cycle for each new edition, authors often don't get the opportunity to reexamine every word of every chapter. We took that opportunity with the ninth edition. So you may notice that some sections within your favorite chapters have been moved later or earlier within the chapter. Our student reviewers told us that this order change made material easier to understand. And you also may notice that some definitions are shorter and more tightly written or that where we had used complex sentences, we've rewritten the material in a simpler structure. Every change is designed to enhance student understanding before you devote valuable class time to the topic.

What's New?

Research Project Examples Examples are what make research methodology understandable. Some of our student reviewers told us that it is the Snapshots of real research that make them stop and consider what they have been reading. Others like to work with cases. We took their advice and enriched the ninth edition with numerous new examples—more than 60 of them—not only in the Snapshots but embedded in the text as well.

Video Cases We took award-winning research projects and with the help of the companies involved developed four new video cases to work with the pedagogy of the book. Lexus, Starbucks, Wirthlin Worldwide, Robert Wood Johnson Foundation, GMMB, Visa, Bank One, Team One Advertising, U.S. Tennis Association, Vigilante New York, and The Taylor Group are some of the firms involved with these research cases.

Written Cases Cases offer an opportunity to tell research stories in more depth and detail. Of course it helps that we have research contacts with really interesting stories to tell. You'll find stories from Ogilvy Research

Award winners on children's health care initiatives, and you'll learn about the American Heart Association's first paid advertising campaign and the research behind it, as well as how the U.S. Tennis Association is revitalizing its sport and, in the process, conducting the largest research project ever related to sport. You'll see how Campbell-Ewald uses research to measure the construct of *respect*. You'll learn how one man with a vision can move airlines as you follow the research being done by the Open Doors Organization in its attempt to substantiate the growing economic power of travelers with disabilities and how NetConversions helps Kelley Blue Book design the most powerful automotive site on the Web. You'll learn how Wirthlin Worldwide helped the American Red Cross use research to revitalize donations and how Starbucks, Bank One (now J.P. Morgan Chase), and Visa dreamed up a new financial product that won *BusinessWeek*'s outstanding product honor. And you'll learn how the low-carbohydrate diet craze inspired Donatos Pizza and how Yahoo! and ACNielsen moved Web metrics a giant leap forward. These are research projects just completed or, in several instances, ongoing.

Content-Related Exhibits In all, you'll find 12 new exhibits and 3 new process series exhibits to make student learning easier. Some of these introduce the student to different types of research—like syndicated research studies and omnibus research—while others explain concepts and constructs, some detail error sources, and others offer examples of Web survey questions.

Web Exercises It's appropriate to do Web searches as part of a research methods course, so each chapter offers one or more new exercises to stimulate your students to hone their searching skills. And for those students without that skill, they will find all the help they need in Chapter 7, "Secondary Data Searches."

Sample Student Project We've replaced the student project of the last few editions with a more comprehensive one. You and your students will find it on the text CD.*

We hope you and your students discover, or rediscover, how interesting research can be.

**Pamela Schindler
Donald Cooper**

* 此部分内容请见 www.mhhe.com/cooperbrm9e.

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Introduction to Business Research

>chapter 1

Research in Business

“For a long time, research companies have offered efficient collection of data, as well as timely and accurate reporting as their primary value propositions to clients. However, clients no longer view operational excellence as a value proposition, but rather as a basic expectation.”

Rick Garlick, Maritz Research

>learning objectives

After reading this chapter, you should understand . . .

- 1 What business research is and how it differs from decision support systems and business intelligence systems.
- 2 The trends affecting business research and the emerging hierarchy of research-based decision makers.
- 3 The value of learning business research process skills.
- 4 The different categories of firms and their functions in the industry.
- 5 The distinction between good business research and research that falls short of professional quality.

>bringingresearchtolife



Myra Wines, director of consumer affairs for MindWriter, Inc., has been charged with the task of assessing MindWriter's CompleteCare program for servicing laptops. As a result, she sent several well-respected research firms a *request for proposal (RFP)*, and she and her team are interviewing the last of those firms, Henry & Associates.

Newly promoted to her position, Wines has a TV journalism and government public relations background. She has been a MindWriter laptop owner since it came on the market decades earlier and has never personally experienced a problem. She wants a research supplier from whom she can learn, as well as one whom she can trust to do appropriate, high-quality research.

The last interviewee is Jason Henry, managing partners, Henry & Associates. H&A comes highly recommended by a professional colleague in a different industry. H&A has gained a reputation for merging traditional methodologies with some creative new approaches. Myra is interested in exploring the firm's methodology for customer satisfaction studies. As Wines approaches Henry in the waiting area, she extends her hand. "Welcome to MindWriter, Jason. I'm Myra Wines."

Henry rises, clasping Wines's hand in a firm handshake. "Pleased to meet you, Myra."

Myra directs Jason's attention to a long corridor. "My team members are gathered in our conference room just down this hall. Let's join them, shall we?"

The interview process starts with Henry's short presentation on H&A and its capabilities. As the interview progresses, Henry shares some impressive results accomplished for former clients in noncompetitive industries. The last slide in his presentation features a top industry award H&A recently won for its customer satisfaction methodology.

During the Q&A that follows, Henry demonstrates current knowledge of the computer industry (he's obvi-

ously read numerous articles), confidence, and expertise, at a level that Wines initially had not expected given his relatively youthful appearance. At the conclusion of the interview, Wines is leaning toward hiring Henry & Associates, but wants to confer with her team.

The next day, Myra calls Jason at his office. "We've chosen Henry & Associates for the MindWriter CompleteCare assessment contract. Congratulations."

"Thank you," accepts Jason. "You've made the right choice."

"I've got two seats on a flight to Austin next Wednesday," shares Myra. "Can you join me? This will be my first look at the CompleteCare facility and my first face-to-face contact with its manager. I'd like someone along who can lay the groundwork for the project and understand the number crunching that's already been done."

The phone goes silent as Jason pauses to consult his PDA. Two internal meetings will need to be shifted, but MindWriter is an important new client. "Yes, I can work that in as long as we're back by 7 p.m. I've got an evening commitment."

"Shouldn't be a problem," shares Myra. "Those seats I mentioned are on the corporate jet. We'll be back by 5:30. I'll meet you in the lobby at the county airstrip at 8 a.m. Wednesday then."

"A quick question," interrupts Jason before Myra can disconnect. "I need some idea of what's happening at this meeting."

"The meeting is to get you started. I'll introduce you to other people you will be working with and share

>cont'd

more details about the concerns we have with the CompleteCare program,” shares Myra.

“Fine. Can you arrange a third seat? It would be best to include Sally Arens from the very beginning. Her expertise will be crucial to the success of the assessment program.”

“Yes, you mentioned her before. That shouldn’t be a problem, but I’ll check and get back to you.”

“Then Wednesday Sally and I will plan on asking probing questions and listening to discover exactly what facts management has gathered, what the managers are concerned about, what the problem is from

their point of view, what the problem really is at various levels of abstraction . . .”

“Listening to people. Discussing. Looking at things from different viewpoints. Those are things I am also very good at,” shares Myra.

“Good. After we hear them out, we come to what H&A is good at: Measurement. Scaling. Project design. Sampling. Finding elusive insights. May I assume we’ll be collaborating on the report of results . . .”

“Absolutely. I’ll call you back within 10 minutes about that third seat.”

> Why Study Business Research?

You are about to begin your study of business research, both the process and the tools needed to reduce risk in managerial decision making. **Business research**, as we use the term in this text, is a systematic inquiry that provides information to guide managerial decisions. More specifically, it is a process of planning, acquiring, analyzing, and disseminating relevant data, information, and insights to decision makers in ways that mobilize the organization to take appropriate actions that, in turn, maximize business performance. A variety of different types of research projects are grouped under the label “business research,” and we will explore them all later in this chapter.

Assume for the moment that you are the manager of your favorite full-service restaurant. You are experiencing significant turnover in your waiter/waitress pool, and some long-time customers have commented that the friendly atmosphere, which has historically drawn them to your door, is changing. Where will you begin in trying to solve this problem? Is this a problem for which business research should be used?

Perhaps you are the head of your state’s department of transportation, charged with determining which roads and bridges will be resurfaced or replaced in the next fiscal year. Usually you would look at the roads and bridges with the most traffic in combination with those representing the biggest economic disaster if closed. However, the state’s manager of public information has expressed concern about the potential for public outcry if work is once again directed to more affluent regions of the state. The manager suggests using business research to assist in making your decision, as the decision is one with numerous operational, financial, and public relations ramifications. Should you authorize the recommended business research?

As the opening vignette and the early decision scenarios reveal, decision makers can be found in every type of organization: businesses, not-for-profit organizations, and public agencies. Regardless of where these decision makers are found or whether their resources are abundant or limited, they all rely on information to make more efficient and effective use of their budgets. Thus, in this book, we will take the broadest perspective of managing and its resulting application to business research.

At no other time in our history has so much attention been placed on measuring and enhancing **return on investment (ROI)**. At its most simplistic, when we measure ROI we calculate the financial return for all expenditures. Increasingly organizational managers want to know what strategies and tactics capture the highest return. In the last dozen years, as technology has improved our measurement and tracking capabilities, managers have realized they need a better understanding of employee, stockholder, and customer behavior in order to influence the desired metrics. Business research plays an important role in this new measurement environment. Not only does it help managers choose better strategies and tactics, but business research expenditures are increasingly scrutinized for their contribution to ROI.

The research methods course recognizes that students preparing to manage any function—regardless of the setting—need training in a disciplined process for conducting an inquiry of a **management dilemma**, the problem or opportunity that requires a management decision. Several factors should stimulate your interest in studying research methods:

1. *Explosive growth and influence of the Internet.* The explosive growth of company Web sites, e-commerce, and electronic publications brings extensive amounts of new information—but its quality and its credibility are increasingly suspect.
2. *Stakeholders demanding greater influence.* Customers, workers, shareholders, and the general public demand to be included in company decision making; armed with extensive information, they are more sensitive to their own self-interests than ever before and more resistant to an organization's stimuli.
3. *More vigorous competition.* Competition, both global and domestic, is growing and often coming from unexpected sources; many organizations refocus on primary competencies, while they seek to improve operations by reducing costs and converting customers to advocates.
4. *More government intervention.* Government continues to show concern with all aspects of society, becoming increasingly aggressive in protecting its various publics by posing restrictions on the use of managerial and business research tools.
5. *More complex decisions.* Managers have more variables to consider in every decision, increasing the manager's need for more and better information and for greater insights from that information.
6. *Maturing of management as a group of disciplines.* The quality of theories and models to explain tactical and strategic results in human resources, marketing, operations, and finance is improving, providing managers with more knowledge.
7. *Greater computing power and speed.*
 - *Lower-cost data collection.* Computers and telecommunications lowered the costs of data collection, drastically changing knowledge about consumers at both store and household levels; employees at the position, team, and department levels; suppliers and distributors at the transaction, division, and company levels; and machines at the part, process, and production-run levels.
 - *Better visualization tools.* High-speed downloads of images allow researchers to help people visualize complex concepts, which enriches measurement capabilities.
 - *Powerful computations.* Sophisticated techniques of quantitative analysis are emerging to take advantage of increasingly powerful computing capabilities.
 - *More integration of data.* Computer advances permit businesses to create and manage a **data warehouse**, an electronic storehouse where vast arrays of collected, integrated data are ready for mining.
 - *More and faster access to information.* The power and ease of use of today's computers offer us the capability to analyze more data more quickly to deal with complex managerial problems. Yet the quantity of collected raw data overwhelms users, necessitating a means to manage it. Early efforts to provide a flow of information to managers used a management information system (MIS). As time passed, the challenge of database management from an MIS perspective included

removing obstacles like resistance to use, reluctance of managers to disclose fully their information needs and decision criteria, costs of single-user report generation, system design time, slow adaptation to changing organization structures, and decision relevance (standard versus tailored reports).

- *Advanced analytical tools for enhanced insights.* Organizations increasingly practice **data mining**, applying mathematical models to extract meaningful knowledge from volumes of data contained within internal databases. Enormous quantities of research data are reduced to relatively straightforward equations with statistical models. Expert systems, an outgrowth of artificial intelligence, and data mining entered the 21st century as important tools for research. Advanced analytical tools are available to answer a variety of research questions. Traditional topics open to modeling—market share, price elasticity, the cannibalization of one product's sales by the introduction of another product, the effects on productivity of changing an employee compensation system, to name a few—create decision support models that reflect the behavior of individuals, households, and industries. Programs that combine modeling and decision support systems evolved in the latter part of the 20th century to provide the most utility to users.
 - *Customized reporting.* While routine MIS reports are useful for well-structured problems and those amenable to a standardized set of procedures, data must be more than timely and standardized; reporting must be customized to be truly meaningful to the user.
8. *New perspectives on established research methodologies.* Older tools and methodologies once limited to exploratory research are gaining wider acceptance in dealing with a broader range of managerial problems.

To do well in such an environment, you will need to understand how to identify quality information and to recognize the solid, reliable business research on which your high-risk decisions as a manager can be based. You also will need to know how to conduct such research. Developing these skills requires understanding the scientific method as it applies to the decision-making environment. This book addresses your needs as information collector, processor, evaluator, and user.

> Planning Drives Business Research

Managers have access to information other than that generated by business research. Understanding the relationship between business research and these other information sources—decision support systems and business intelligence—is critical for understanding how information drives decisions relating to organizational mission, goals, strategies, and tactics.

Goals

A local bakery would have different goals than Nabisco, but each likely has goals related to sales (membership), market share, return on investment, profitability, customer acquisition, customer satisfaction, customer retention, employee productivity, machine efficiency, maximization of stock price (or owner's equity), and so on—whether codified in a written plan or detailed only in an entrepreneur's brain. To assist in making increasingly complex decisions on goals, strategies, and tactics, managers turn first to information drawn from the decision support system, combined with that generated by business intelligence on competitive and environmental activity.

Decision Support

The need to complete one or many exchanges with its prospective customers drives every