



Eavesdropping on Customer Conversations

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grail research
an Integreon company

Every day customers talk and listen to each other



What can you learn by eavesdropping?

Listen and Learn

- Gain insight into:
 - Customer needs
 - Product likes/dislikes
 - Competitors and substitutes
 - Buying process

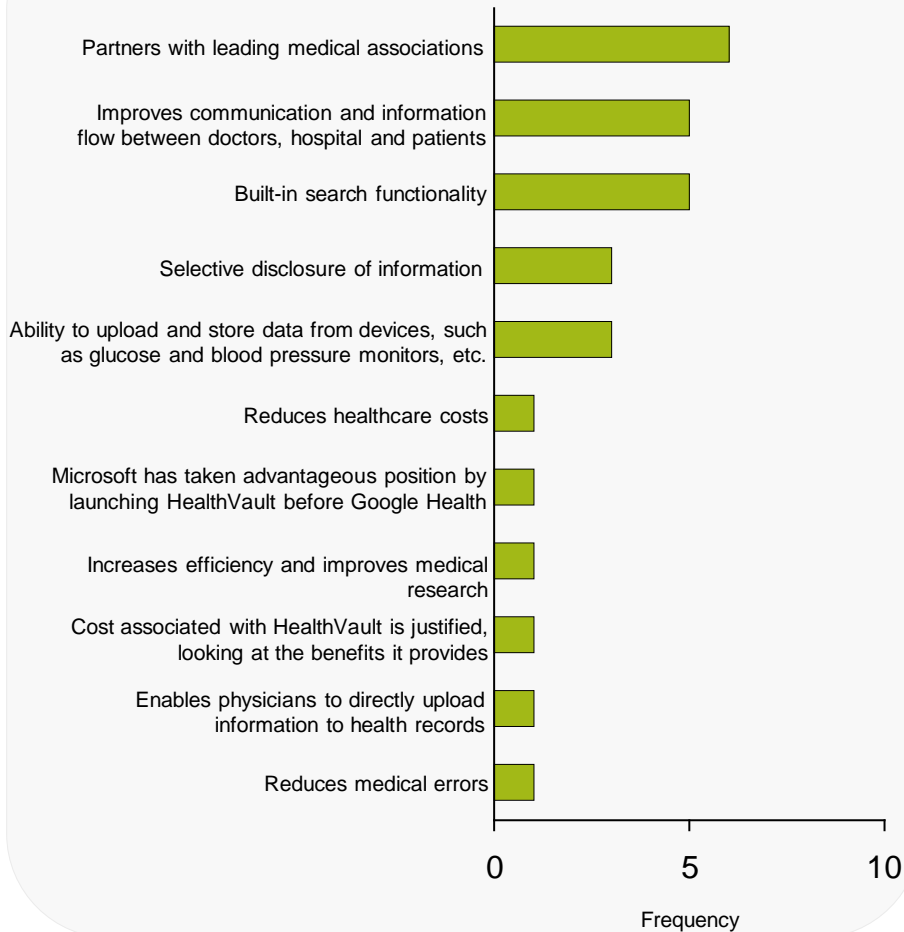
- Helps provide organizations with:
 1. Real-time market reaction to an announcement
 2. Comprehensive and quantitative view of the market's perspective (pros and cons)
 3. Longitudinal view of how the market's perspective is changing over time

1. Real-Time Market Reaction

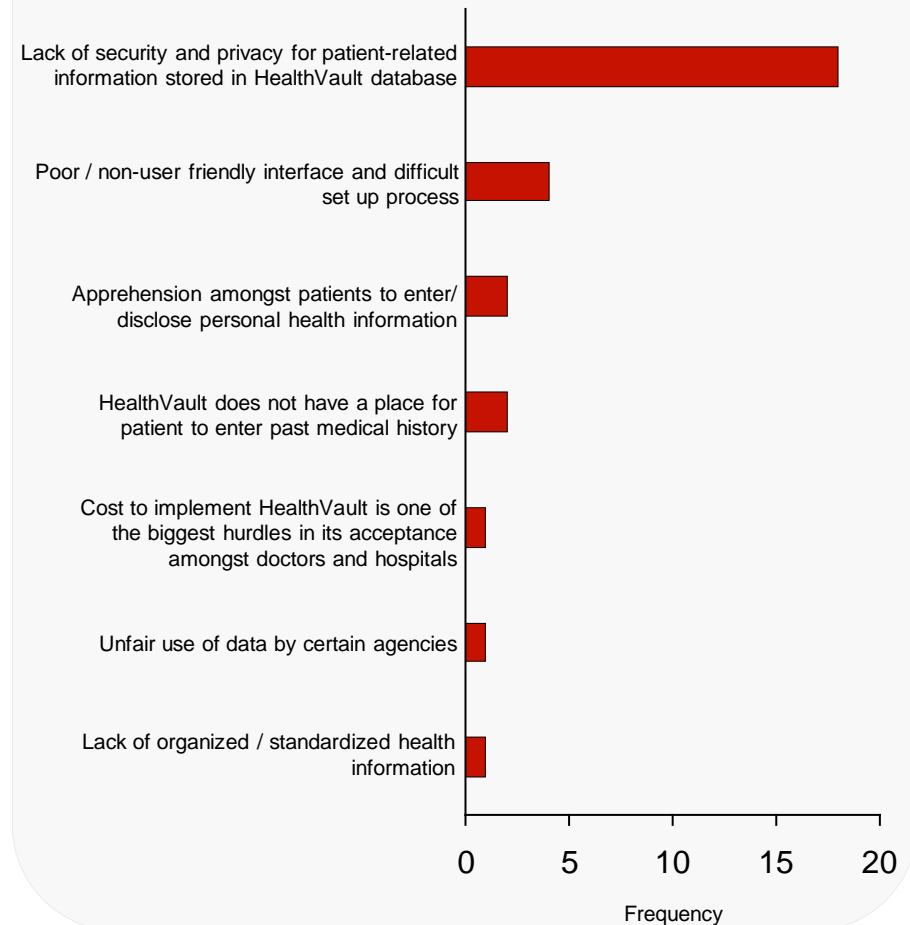
Immediate reaction to Microsoft's HealthVault Launch

Microsoft launched HealthVault on October 4, 2007. This is "what people were saying" in the first 48 hours after the announcement

Pro-Arguments



Con-Arguments








Source: Analysis of various blog, forum and other online postings October 4-5, 2007

2. Comprehensive Market Perspective

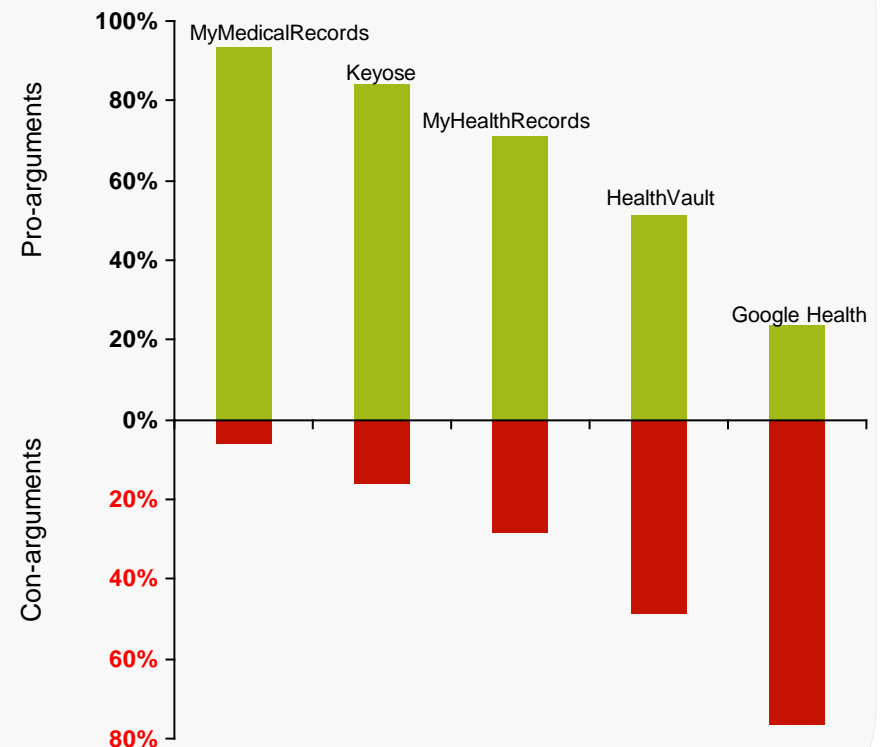
Overview

We analyzed “what people were saying” online for five products in the Personal Health Records space

Products Profiled

Company	# articles/ blogs	# of arguments
	30	41
	24	40
	10	19
	9	14
	7	16

Argument Frequency

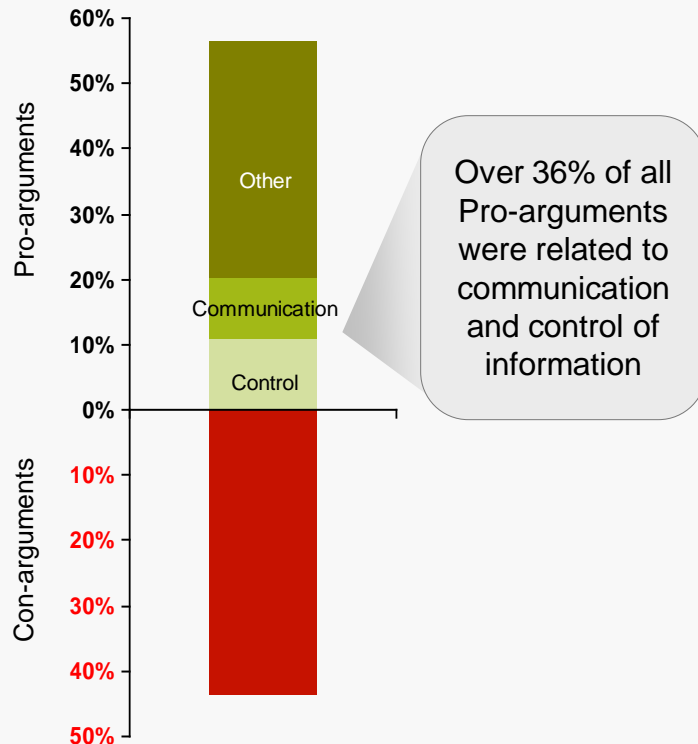


2. Comprehensive Market Perspective

Pro-Arguments Analysis

“Increased control over personal data” and “improved communication between patients, doctors and hospitals” were the most highlighted benefit of PHRs

Overall Argument Frequency



Direct Quotes

“Of course this is a good idea. Right now how much visibility do you have into who gets which of your medical records and when? For most folk the answer is at best unclear. Consumers are generally uninformed and thus powerless.”

-Preston L. Bannister , blog.wired.com

“Getting people to embrace digital personal health records is a Holy Grail for both the healthcare and technology industries.”...“A shift to widespread use of online personal health records is the first step needed to change the focus of the healthcare system from one of constantly treating full-blown ailments to preventing them in the first place”

-Erick Schonfeld, TechCrunch

“PHRs have the potential, to significantly improve communication between doctors, hospitals, and patients.”...“No more fumbling with handwritten lists of medications or calls to doctors offices to obtain a patients medical history.”

-Joshua Schwimmer, MD, FACP, FASN, Healthline

“The key to HealthVault's initial appeal is its all-in-one-place access to a range of applications plus the ability for some of those applications to “play together” in a way has not previously been possible.“

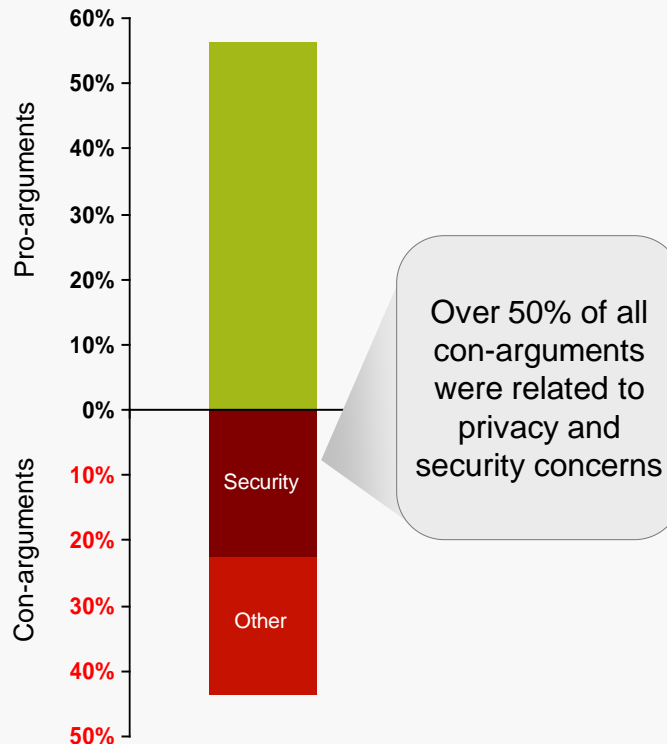
-Stephen Barlas , EContent

2. Comprehensive Market Perspective

Con-Arguments Analysis

As expected, security and privacy are of great concern to people and must be addressed in order for PHRs to be successful

Overall Argument Frequency



Direct Quotes

"Just because it's medical information consumers assume that it's protected under federal law - that's not the case,"

-Pam Dixon, Executive Director of the World Privacy Forum

"The term HealthVault is misleading because we know by definition that such services will be anything but a vault when it comes to privacy."

-Ignacio H. Valdes, MD, MS, LinexMedNews

"Microsoft HealthVault's privacy policy concludes: 'We may occasionally update this privacy statement'. Which means that when the commitments that Microsoft has made regarding HealthVault become inconvenient, they will simply change them."

-Fred Trotter personal blog

"I find it hard to imagine that I'm the only person who worries about the over-reaching umbrella of Google linking up to every other site who joins the Data Portability Workgroup and the sheer amount of amassed information any one entity could end up possessing about me."

-Cyndy Aleo-Carreira, profy.com

"We've gotten an early glimpse of Google Health from Google Blogscoped, and it looks like privacy advocates' worst nightmare. "

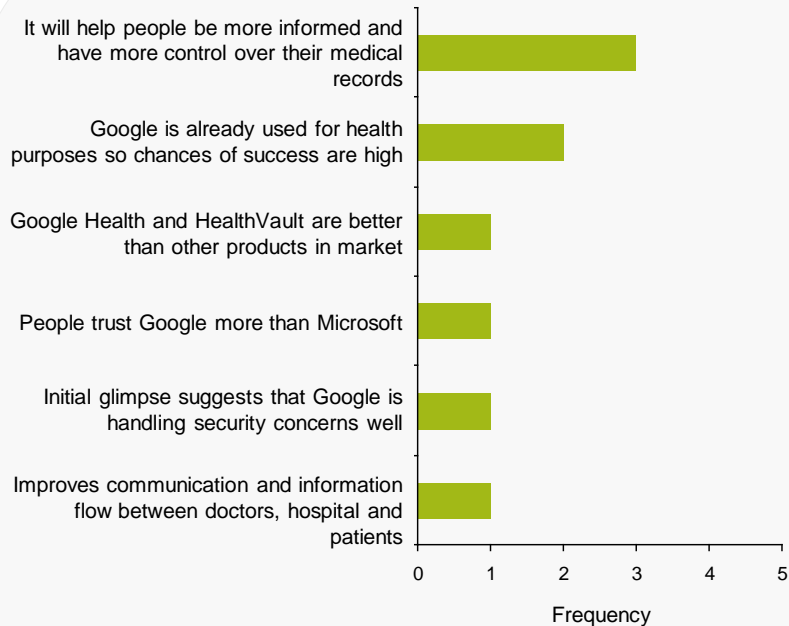
-Betsy Schiffman, blog.wired.com

2. Comprehensive Market Perspective

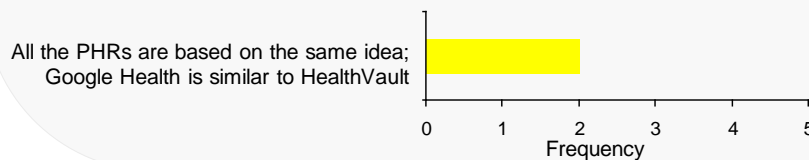
Google Health Analysis

Although Google's brand recognition is a positive in some instances, many people are unsure if they can "trust" Google because they associate it with the Search Engine

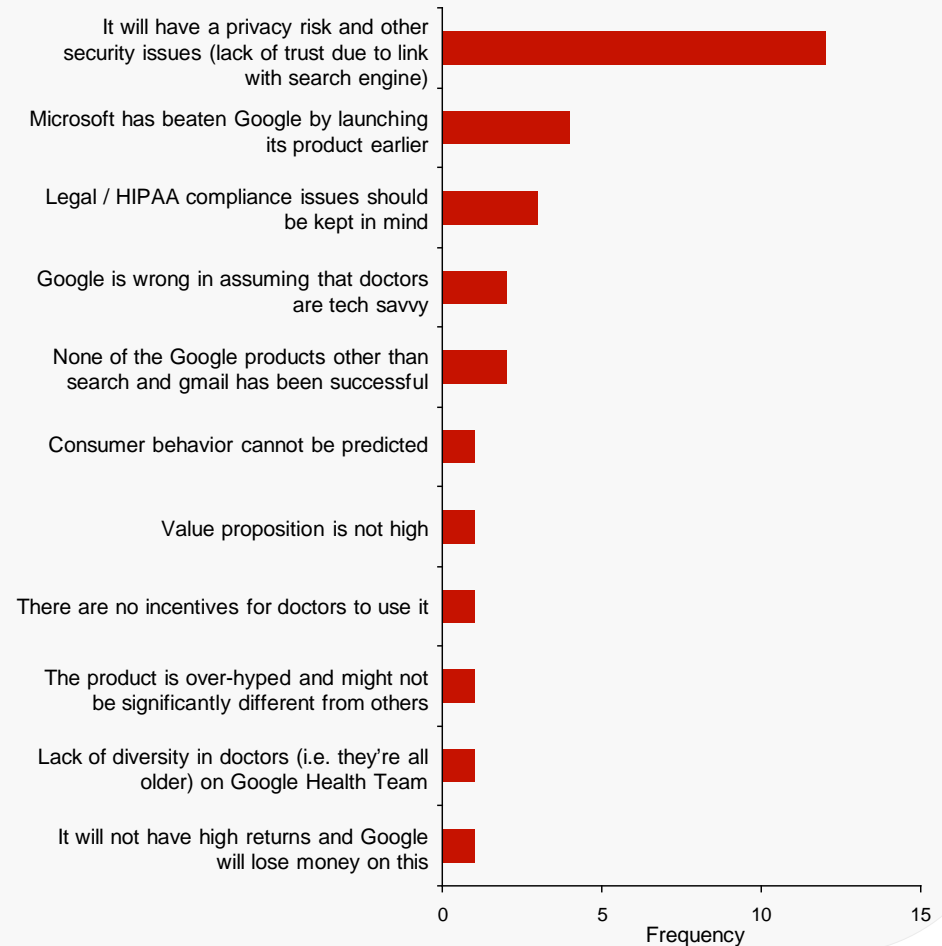
Pro-Arguments



Neutral Arguments



Con-Arguments



2. Comprehensive Market Perspective

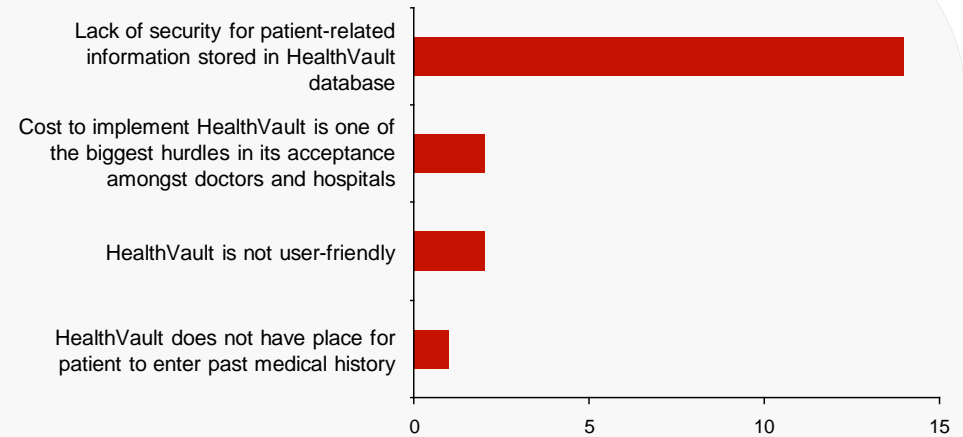
HealthVault Analysis

People felt that HealthVault is a high value-add product that has a market advantage, having launched prior to Google Health

Pro-Arguments



Con-Arguments



Source: Analysis of various blog, forum and other online postings since 2006

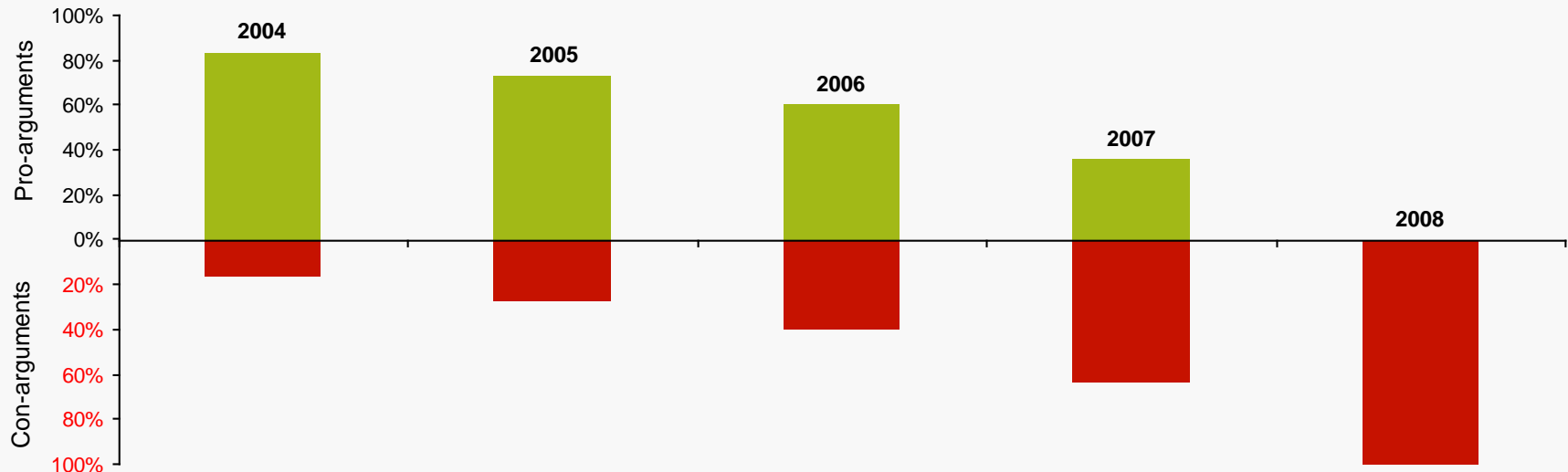
3. Longitudinal View

Arguments for Regional Health Information Organizations (RHIOs)

Longitudinal analysis of “what people were saying” about RHIOs demonstrates a shift in momentum over time

Organization	Timeframe	# of blogs/articles	# arguments
Regional Health Information Organization (RHIO)	2004 - 2008	55	77

Percent of RHIO Pro and Con Arguments Over Time



Source: Analysis of various blog, forum and other online postings 2004-2008

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Key Takeaways



- Faster than traditional approaches
- More cost-effective than surveys
- Broader, deeper and unfiltered content
- Critical mass of data available for many sectors especially consumer products, healthcare, technology



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