



Ellen V. Schaefer

Summary of Qualifications

- * Skilled Focus Group Moderator and Meeting Facilitator; conducted thousands of groups and meetings with consumers and professionals.
- * Over 30 years experience in marketing and participatory planning.
- * Experience in addressing a variety of issues: new product/service development, advertising, communications, public relations, customer satisfaction, and strategic planning.
- * Marketing focus, with an emphasis on addressing critical objectives, reasonable and practical approaches, and actionable results.
- * Background includes work with wide range of organizations and industries: Agriculture, Associations, Construction, Consumer Packaged Goods, Distribution, Education, Environment, Financial Services, Food and Beverages, Government, Healthcare, Non-profits, Office Equipment, Pharmaceuticals, Retailing, Social Services, Technology, Telecommunication, and Utilities.

Employment History

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| 1988 on | Group Works, Principal
<i>Sacramento, California</i> |
| 1979 - 1988 | McKesson Corp., Manager, Marketing Research & Planning
<i>San Francisco, California</i> |
| 1978 - 1979 | Drossler Research, Project Director
<i>San Francisco, California</i> |
| 1974 - 1978 | General Foods Corporation, Research Analyst
<i>White Plains, New York</i> |

Education

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| 1978 | Northeastern University, Boston, Massachusetts
B.S. Business Administration; Marketing, Magna Cum Laude |
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Professional Associations

American Marketing Association (AMA)
International Association of Facilitators (IAF)
Qualitative Research Consultant Association (QRCA) – San Francisco Chapter Treasurer



Meeting Facilitation Services:

- ⇒ Board Retreats
- ⇒ Brainstorming/Ideation Sessions
- ⇒ Community Forums
- ⇒ Customer Advisory Boards
- ⇒ Focus Groups
- ⇒ Strategic Planning Meetings
- ⇒ Visioning Workshops

Types of Participants:

- Board members
- Buyers
- Consumers
- Employees
- Executives
- Mothers
- Nurses
- Patients
- Pharmacists
- Physicians
- Professionals
- Small business owners
- Seniors
- Social workers
- Students
- Teachers
- Voters



Client List:

Albertson's Incorporated	Pacific, Gas and Electric Company
Altair Eyewear	Pepperidge Farm
BloodSource	Power Reviews
Breathe California	Rice Growers Association of California
California Landscape Contractors Assoc.	River City Bank
California Public Utility Commission	Runyon Saltzman & Einhorn
California Student Aid Commission	Sacramento Children's Home
California Tobacco Control Alliance	Sacramento Tree Foundation
Center for Culinary Development	Sacramento Metro Airport
City of Roseville	Sacramento Municipal Utility District (SMUD)
County of Sacramento Department of Health and Human Services	SAFE Credit Union
Department of Consumer Affairs Bureau of Automotive Repair	San Juan Unified School District
Dole	Seattle's Best Coffee
Drexel University	Signature Properties
EdFund	State Teachers Retirement System
Golden 1 Credit Union	SureWest Communications
Hanson McClain, Inc	Susan G. Komen for the Cure
John F. Kennedy University	TheFind.com
John Laing Homes	UC Davis Health System
KB Home	UC Davis M.I.N.D. Institute
McKesson Corp.	UC Davis School of Medicine
Monterey Institute of International Studies	University of Sacramento
Mount Zion Hospital and Medical Center	Valu Rite Pharmacies
NorthBay Healthcare System	Wells Fargo Bank
Office Depot	Wharf Research
	Zee Medical



Group Works Capabilities

■ Meeting Facilitation Services:

A professional meeting facilitator can improve the results of your meetings by helping you develop an action-oriented agenda and by moderating the meeting to keep participants involved and on track. Examples of the types of meetings that benefit from an experienced facilitator include the following:

Board Retreats – Non-profit organizations run by volunteer boards who are meeting for the first time and need to get to know each other, develop an understanding of the organization's purpose and begin working on issues in a short period of time.

Ideation Sessions - To generate ideas for new products, names, promotions, fundraising ideas or other marketing elements. Process maximizes output of ideas and increases odds of coming up with potential successes and also promotes team building.

Community Input Forum – Organizations that provide services to a community often need to invite the public and various stakeholders to provide input on specific issues. A facilitator can help structure these meetings to ensure even participation and productive outcomes.

Customer Advisory Boards - To get input from representatives of key customer targets and industry experts and to provide a forum for management and customers to discuss key issues facing business.

Focus Groups - The classic research "meeting" designed to gather information on attitudes and behavior of customers to aid marketers in developing or refining plans.

Group Problem Solving - To solve problems in a group setting. The process identifies key issues, promotes creative problem solving and involves participants in achieving consensus and commitment to solutions.

Strategic Planning Meetings - To develop overall plan for department, business or organization based on situation assessment, identification of critical issues and development of specific action plans. Group process allows for input from multiple functions and greater commitment to action due to involvement.



■ **Traditional Consumer and Professional Focus Groups**

Developing new products and services
Understanding key drivers of customer satisfaction
Evaluating communication materials
Exploring new markets

■ **Online Groups ~ Bulletin Board Format**

Online technique offers method to conduct research with busy professionals

Questions are posted daily over 3-5day period on electronic bulletin board and respondents can log on when they choose to post their answers and react to comments made by colleagues

Some advantages of the technique:

- Allows geographically dispersed respondents to participate
- Respects busy schedule of participants who can participate any time of day from home or office at their convenience
- Client also can follow discussion at their convenience
- Respondents can remain anonymous to each other
- Complete transcript of discussion is automatically produced

■ **Web Site Usability Testing**

In-depth observational interviews to evaluate usability of Web sites enable clients to:

- Hear customer impressions of Web site and “fit” with organization image
- Learn what information users expect/want to find
- Develop ideas on how to structure site to match user needs
- Identify any navigational problems
- Learn user language and uncover any areas of confusion

Focus group facility has picture in picture video to allow viewers to see monitor and respondent facial expressions simultaneously



ELLEN V. SCHAEFER

Ellen V. Schaefer, principal of Group Works, provides marketing consulting services to organizations in the areas of marketing research and meeting facilitation. She specializes in moderating focus groups and conducting in-depth interviews to help organizations develop a greater understanding of their target audience's attitudes and behavior. Gaining insights about consumer motivations helps clients develop products and services that meet key consumer needs and helps client organizations develop more effective communication programs

In addition to focus groups, many clients also use Group Works' facilitation services to moderate key team planning meetings, brainstorming sessions, customer advisory boards or strategic planning retreats.

Ellen has over thirty years of experience in a variety of industries and in the public sector. Her work includes applications in the areas of advertising, public relations, customer satisfaction, public awareness campaigns, new product development, and strategic planning.

Prior to starting her own firm, Group Works, Ellen worked at McKesson Corp. in San Francisco for ten years in the marketing research and planning department, managing a broad range of research and planning programs. Her research background also includes experience working for Drossler Research, a full-service research supplier in San Francisco and four years in New York with General Foods, a premier consumer packaged goods marketer.

Ellen's professional associations include memberships in the (AMA) American Marketing Association, the (QRCA) Qualitative Research Consultants Association and the IAF (International Association of Facilitators). She is a past Co-chair and current Treasurer of the San Francisco chapter of QRCA. Ellen earned a B.S. in Business Administration, with a Marketing major from Northeastern University in Boston in 1978.

In addition to running her own business and her professional association activities, Ellen has been an active volunteer in the San Juan Unified School District, holding multiple positions in PTA, including PTA President at elementary, middle and high school levels and serving on the Superintendent's Parent Advisory Committee. She is the Past President of the Friends of the Library for the Arden~Dimick Library.



Ellen Schaefer, Principal

Group Works

861 San Ramon Way
Sacramento, CA 95864

916.974.0555

FAX 974.1545

ellen@groupworks.net

www.groupworks.net

Group Works Services:

Market Research Consulting

Focus Groups
IDIs (In-depth interviews)
Survey Design
Web Site Usability Testing

Meeting Facilitation

Brainstorming Sessions
Community Workshops
Customer Advisory Boards
Planning Retreats