



Competitive advantage through  
customer satisfaction

Case: Koulutettujen Hierojien Liitto



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**Competitive advantage through  
Customer satisfaction**

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The main objective of the thesis was to investigate how customers perceive the services of wellness improvement providers such as massage therapists, chiropractors, physiotherapists or someone practicing a similar profession, and how this information can be used to gain a better competitive advantage. The motivation for implementing this survey was the low level of business education in these fields and the lack of awareness about how to manage their scarce resources beneficially. The survey offers guidelines for how these professions can meet more accurately the expectations of their customers and how they can manage their resources to gain a competitive advantage over their competitors through the ability to offer superior service experiences.

The theoretical section of the thesis was based on investigating what is essential to good customer service, how quality of service is increased and which subjects influences how customers perceive the service. Theory related to the implementation of the survey and the validity of the case study is also defined in this section.

The empirical research was implemented using a quantitative customer satisfaction survey. The survey took place in the November of 2010 via emails and personal interviews to a randomly chosen group of people from friends, family and some massage therapists' current customers at their own practices. The method used in the selection of the respondents was chosen to receive the widest selection of different opinions from people with different backgrounds.

The findings from the customer satisfaction survey indicated clear trends in the market and possible fluctuations in the opinions of the professionals in the field. The results from the survey were investigated and compared to the theoretical section, and based on these results suggestions for improvements of the services were made.

Key words    Customer service, competition, satisfaction, quality

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### Competitive advantage through customer satisfaction

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Tämän tutkimuksen tarkoituksena on tutkia, miten ihmiset näkevät terveydenhoitopalvelut, esim. hierojien, kiropraktikkojen, fysioterapeuttien ja muiden vastaavien palvelujen tarjoajien palvelut, ja kuinka tämä tieto voidaan kääntää näiden kilpailueduksi. Motivaationa kyselyn toteutukseen oli alan heikko kaupallinen koulutustaso ja tietämättömyys siitä, kuinka hallinnoida resursseja hyödyllisesti. Tutkimus tarjoaa näille aloille ohjenuoran siitä kuinka kohdata asiakkaiden odotukset tehokkaammin ja kuinka hallinnoida resursseja saavuttaakseen paremman kilpailukyvyyn tarjoamalla asiakkaille parempaa palvelua.

Teoreettisen osion pohja tutkimukselle on rakennettu tutkimalla, mitkä ovat avainasiat hyvälle asiakaspalvelulle, miten palvelun laatua voidaan korottaa ja mitkä seikat vaikuttavat siihen miten asiakkaat kokevat palvelun laadun. Teoria kyselyn toteutukseen ja kyselyn validiteetti on määritelty tässä osiossa.

Kyselyn empiirinen osio toteutettiin kvantitatiivisena asiakastyytyväisyyskyselynä. Kysely toteutettiin marraskuussa 2010 sattumanvaraisesti valikoitujen ihmisten henkilökohtaisilla haastattelulla ja emaililla. Vastajaat oli valittu ystävien, tuttavien ja perheenjäsenten joukosta ja osa vastaajista oli hierojayrittäjien asiakkaita. Kyselyn toteutus valittiin siten, että saavutettaisiin mahdollisimman paljon erilaisia mielipiteitä ihmisiltä, joilla on erilaisia taustoja.

Tulokset osoittivat selkeitä suuntauksia markkinoilla ja myös eroavaisuuksia asiakkaiden mielipiteissä alaa kohtaan. Tulokset tutkittiin ja verrattiin teoriaosuuteen, jonka pohjalle palvelun parannusehdotukset kerättiin.

Asiasanat asiakaspalvelu, kilpailu, tyytyväisyys, laatu

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## 1 Introduction

### 1.1 The objective of the study

Satisfaction of customers is widely regarded as an essential factor for any business, and is important that the rate of the satisfaction should be measured regularly in order to define how successful the business actually is, and it is a rather good indication when the company is making a profit. However, at least for the author this is not enough and for some managers also this might not be enough. The market could be offering much more to the business which can be revealed through a thorough investigation. The other aspect that drove this study was not only to investigate how with fairly good customer service the company can succeed, but also the necessary factors for a longer term sustainable customer base and how they can exceed the customers' expectations. On the basis of the case study the goal is to create guidelines on how to manage resources most efficiently for massage therapists to develop their services and actions to match their customers' expectations in general. The secondary goal of the study was to investigate potential and also most commonly faced problems of the services and to suggest improvements, so that the services could become more customer friendly. In future the same questionnaire can be used again to investigate the progress of customer satisfaction and to compare the results to the outcome of this one.

### 1.2 Research problem

This thesis was conducted on behalf of Koulutettujen Hierojien Liitto for small service providers like massage therapists to research how customers in general perceive massage therapists and what aspects would need to be changed and developed for better customer satisfaction. Massage therapy and other similar practices seem to be practised by a single entrepreneur and therefore their resources are rather limited compared to bigger organizations. The study aimed to help service providers to use those few resources the most efficiently and to clarify the correct placements for the resources to gain the best competitive advantage.

### 1.3 Outlook of massage therapy in Finland from authors point of view

Massage has been an approach in the management of patients with various disorders dating back to ancient times and continues to play a significant role in current health care. The appreciation of massage therapy went into decline with the arrival of modern medicine. At the turn of the millennium awareness of holistic healing begun to strengthen its position with people looking for substitution to regular drug use in healing. Also the popularity of massage

therapy is strengthened by the acknowledgement of the adverse effects of drugs and people are more conscious of their health, so people are keen on trying alternative healing methods.

The need for services is rising most among the elderly and people in home care. The aging of the population, with large numbers soon going into retirement, and the movement from facility care to home care is a clear trend nowadays. This is a huge opportunity for massage therapists and will increase the demand for services. In the future private health care is going to have a big role in caring selection in order to relieve pressure from the government's facility services. These private wellness services are going to be a true option next to traditional healthcare. Additionally, as more workplaces try to position themselves as employee-friendly, many companies will want to provide in-office, seated massages for employees as an on-the-job benefit. More and more people perceive that massage is an increasingly popular technique for relaxation and stress reduction.

In the future manual methods and rehabilitation services are going to have an even bigger role. Patients are not going to be looked at as just a shoulder or an arm, rather the focus is going to be more on the whole body and on the patient's physical being. Social-, health- and physical education businesses will benefit from increasing the information based on case studies, which will help them to increase their quality of service through better knowledge of their customers' needs and expectations.

Every year in Finland the transition from medicating and nursing towards wellness services has been rising and even big insurance companies are beginning more accepting of alternative healing methods. Common healthcare massage therapy and other alternative healing methods are becoming a more acknowledged and approved way of healing and treating patients. A problem facing this field of business is the level of education is rather low, meaning that they know only about their own field of business and that the development of the entire field of business is not the main focus of the employees. Also the number of personnel in the field of alternative healing methods on other wellness services is rather low; people don't educate themselves to work in this field anymore.

In the near future entrepreneurs will need to invest more in continuous education, networking and cooperation with others in the caring business. Also the quality of services is becoming more essential, because the demand is rising meaning that competition is growing with it. Cooperation and networking is a commonly used strategy amongst businesses to build their competitive advantage. Cooperation and networking is essential to improve customer service, because not everything can be healed with alternative methods, so it is good customer service to be able to point out the right facility for the customer.

## 2 Service

### 2.1 Definition of service

Service has many special features which affect marketing and need to be taken notice of so that customers can be satisfied (Ylikoski 2001, 17). According to Grönroos (2001, 78) service is not a simple thing that can be easily explained, service as a concept is a complicated matter. The word “service” has multiple meanings from personal service to service as a product. Grönroos states that almost all products can be turned into services, if the seller or the service provider adjusts the product according to the customers’ smallest requirements. In this instance the product is nothing tangible, but being delivered to the customer in a superior way will turn it into a product.

Customer service and diverse a variety of additional services supporting the company’s core competence are the most important activities for specialized shops to stand out from bigger supermarket chains and department stores also selling similar services and products. When buying services or deciding upon the supplier of the services, the customers will consider the benefits being gained from the service. The core benefit is that someone is doing something for someone (Ylikoski 2001, 18-19). Massage therapists deliver muscle maintenance for their customers, even though the customers could stretch more often to keep their bodies flexible.

Service is an act, activity or performance where the customer is offered something intangible, that is often produced and consumed simultaneously and which offers the customer added value; time savings, ease, comfort, entertainment or health improvements. The service organization can be defined by which offerings are services that are clearly the main interest of the customers (Ylikoski 2001, 20).

### 2.2 Service quality creation

Human relationship skills have an essential meaning to a company’s success. The service environment and interaction skills of the staff and the quality outcome create the service experience. The service environment influences the customers’ first impression of the company. The first impression is created already within the first seconds or the first minutes and is very sustainable (Isoviita & Lahtinen 1998, 63).

There is a clear linkage between customer satisfaction and the quality experienced by the client. In reality the quality of the service is always the clients own vision of quality and how the service process meets the vision. Every customer has certain expectations and a picture of the company image in their minds according to their previous experiences, friends and

relatives' opinions and marketing actions. Quality experiences are influenced by comparing the expectations to the received quality of the service and the image of the company. Due to the fact that experiences and expectations are perceived differently from person to person, it is clear that the perception of quality is very individual (Rope & Pöllänen 1994, 30).

Customers' expectations are influenced by the company's image and act as a filter in the service experience. If the company is well known, the reputation usually improves the company's image. Likewise, a bad reputation of the company or a product is likely to turn away possible clientele. Image is a customer's impression of the company's willingness and ability to satisfy their needs (Lahtinen & Isoviita 1998, 63).

According to Grönroos (1991 68-71) there are ten steps affecting the quality of the services:

1. It is important that company service actions are reliable and consistent. The company strives to perform their services right from the first time and to be delivered as agreed.
2. Swiftness of service, just-in-time delivery and immediate contact with the customer indicates employees' willingness and readiness to serve the customers.
3. When the company wants to be seen as a professional company, the staff needs to have professional knowledge and skills as well.
4. The service needs to be easily accessible. This means that contacting the company is made easy, without excess waiting and opening hours need to be reasonable for the customer base.
5. The employees' appearance and their discretion towards the customers' belongings are an aspect of courtesy towards customers. Contact personnel ought to behave in a friendly manner and respectfully and according to approved social standards towards customers.
6. Communications are a relevant part of the service experience and should take place in a way that the customer will understand everything without any confusion e.g. price of the service. Also to listen to the customer is relevant to the correct outcome of the service process.
7. The company's reputation and the contact personnel's personality influence the customers' experience of the service quality. The credibility of the company in the

eyes of the customer is dependent on how customers' interests are advocated and how sincerity pointed.

8. For service to be high quality, it needs the customer to feel a certain amount of security when using the company's services. Risks and doubts should be not included into a confidential customer relationship, but a physically and financially secure relationship between the company and the customer needs to be established.
9. The more individually the customer is treated and the more well known the regular customer is the better the service is perceived. The customer and his/her needs are taken seriously in every situation and the service provider inquires the customers' special requirements to create a better relationship with the customer.
10. The premises, appearance of the staff and other customers are the physical elements of the entire service creation. All of the physical elements can influence the service quality.

### 2.3 Three elements of service production

Providing service consists of a series of events and in these events three main elements can be distinguished. The customer who is being serviced is the key to the entire process. The main elements of producing a service are (Lahtinen & Isoviita 1994, 112):

1. Service environment
  - Location
  - Business premises that are pleasant, comfortable and spacious
  - Appropriate service equipment
2. Contact personnel
  - Highly professional and competent
  - Helpful and pleasant
  - Service that is fast and well managed
3. Other Customers
  - Experiences and word-of-mouth
  - Recommendations of other customers
  - Negative word-of-mouth travels fast and far

## 2.4 Marketing

Marketing is a function of the business world, which is used to identify unfulfilled needs and wishes, specify and measure their size and profitability; determine which target groups can be served, deciding suitable products, services and programs to serve the chosen target group and which encourages everybody within the organization to develop their emotions and willingness to serve customers (Kotler 2006, 203).

Grönroos (2001, 81) states that today ever larger number of companies are faced with a situation where their core competence does not guarantee their competitive edge. Their customers have become more enlightened of their options and therefore can be more demanding about getting better value for their money. The competition among service providers has become reality for many companies.

With a help of marketing the organization informs their possible customers what they have to offer and of their features: what type of services they have to offer, what they cost, booking methods. Marketing is also used to create an image for the services and the organization. The purpose of marketing is also to influence their customers' shopping behavior (Ylikoski 2001, 281).

To create a very successful marketing campaign the company needs to know their target group, their needs, characteristics and what the campaign aims to achieve. After this the company needs to decide which actions need to be taken to reach their target group most efficiently (Ylikoski 2001, 282).

Kotler (2005, 16) states that the key in succeeding to the business world is the ability to create, deliver and communicate more value more efficiently than their competitors. This can be achieved by using marketing activities, also known as the marketing mix, which consist of a set of marketing tools used in pursuing the company's marketing objectives. Kotler (2005, 19) has divided these into four different groups as four Ps, product, price, promotion and place. All these four groups can be divided further into smaller subgroups as follows:

- Product: variety, quality, design, features, name, sizes, packaging.
- Price: list price, discounts, allowances, financing, credit terms.
- Promotion: media, advertising, sales force, PR, coverage, budget, message.
- Place: location, logistics, transport, channels, channel members.

These four Ps represent the service providers' view of the methods that he/she can use to make an impact on the target market. The ideal situation is that the right product can be

sold at the best profit margin, in a perfect place with suitable promotion for the target market (Kotler 2005, 19).

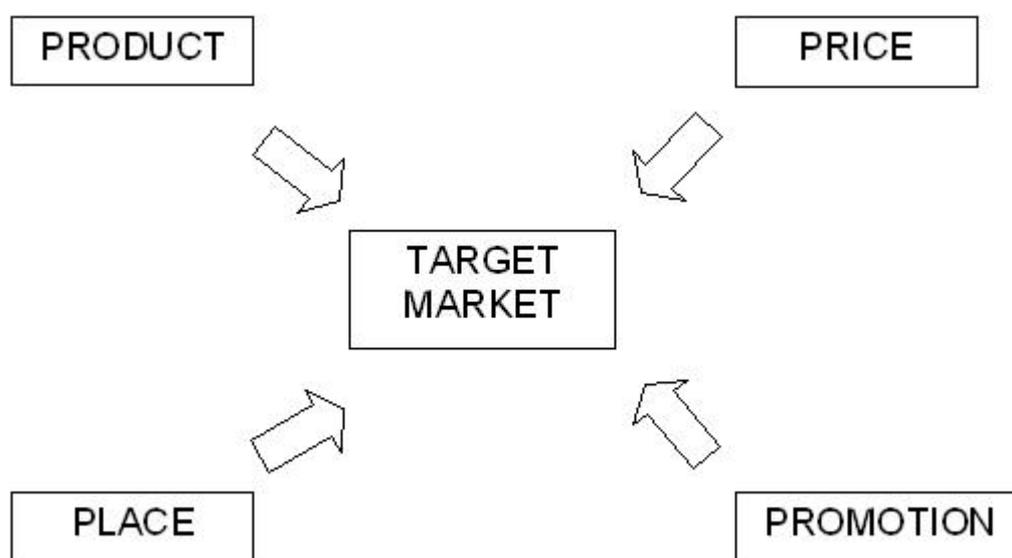


Figure 1: 4Ps affecting target market

Rope & Pöllänen (1994, 131-132) suggest differentiating the customer base into four main groups according to their visits. First are regular customers who are faithful to the company and use the company's services clearly more often than others. Random shoppers also use the competitors' services and don't have any personal feelings towards the company. The third group consists of the non-customers who have never used company's services and the last group is the group that have used the company's services in the past but stopped or switched to using competitors products and services.

Rope & Pöllänen (1994, 132) also divide customers into three groups according to the volume of their purchases, which can be used separately or to define the previous four groups even further. The first group consists of the customers who buy the most and that are usually the smallest group, 20/80, meaning that they are 20% of the company's customer base, but purchase 80% of the company's volume. The second group is the 80/20, who buy only 20% of company's volume but which is a much bigger group. And the last group of this category consists of the non-buyers, who are not the company's customers.

## 2.5 Factors affecting customer satisfaction

Only really satisfied customers make repurchases and spread good information about the company. The company needs to serve their customers in a way that the customers feel that they can trust the company in any way and in all situations. Only the companies that develop

their service quality and range will gain competitive and profitability advantages (Grönroos 2001, 179-181).

A customer centered company tries to accomplish their mission with the help of improvements in their customer satisfaction. To affect customer satisfaction the company needs specific information about what exactly makes their customers satisfied and to accomplish this the company needs constant information from their customers (Ylikoski 2001, 149).

The satisfaction is created when a customer enters the company's domain and receives the company's contact surface. The contact surface consists of all the following

1. Personnel contacts (customer service or sales)
2. Product contacts (durability, price or functions)
3. Support services (invoicing, marketing, delivery or after sales)
4. Environment contacts (interior decoration, tidiness or parking)

All these contacts create experiences that are compared to the expectations the customer had towards the company before entering (Rope & Pöllänen 1994, 28).

When a customer uses some of the company's contacts, for example delivery, to investigate the rate of customer satisfaction, the company needs to take into account the fact that customers might have different ideas of good delivery service. Other customers might appreciate early delivery when the other might expect just-in-time delivery. They might also be in different situations when the rate of satisfaction is compromised with some external interference, and normally the customer could be really difficult to please (Kotler 2006, 146).

The level of satisfaction is the outcome of customers' expectations versus experiences, which are formed on the basis of personnel, products and support- and contact systems (Figure 1). A good example of this is that people have higher expectations of five star hotels than of two star motels. If the operations and standards are at the same level in both place the customer in the five star hotels are more likely to be dissatisfied, but the customer in the motel is going to be overwhelmed. When striving for customer satisfaction it is essential to know the levels of the customers' expectations and experiences, so they can be met and exceeded (Rope & Pöllänen 1994, 30)

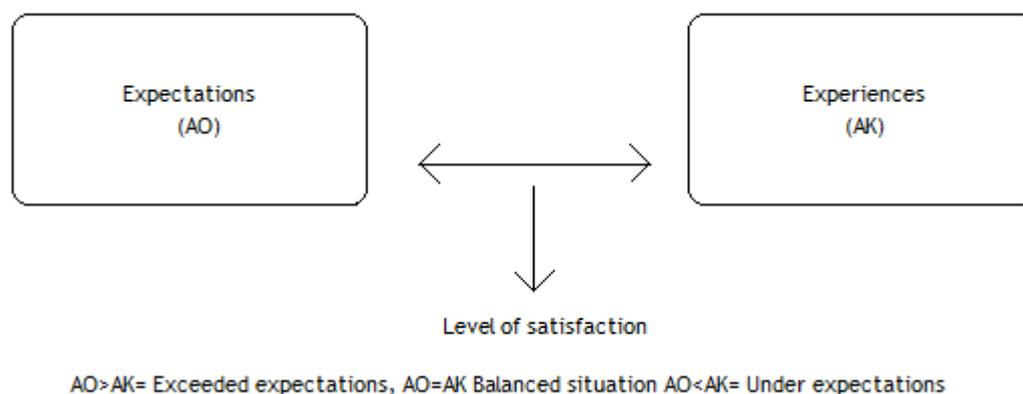


Figure 2: Level of satisfaction  
(Rope & Pöllänen 1994, 29)

Rope & Pöllänen (1994, 30-31) differentiate the expectations into three different categories. The first one is dream-expectations that are all the things that a customer dreams of getting from a product or a company's services. These could be like cheap prices, friendly personal service, perfect product selection, very high quality and perfect location. When investigating this category is important to remember that these expectations might vary drastically between persons.

The second category is advance-expectations is similar to image, it is customers' idea of the company and its products, prices, quality and services. Based on this the company should build their image so that it affects customers' impressions of the company and creates competitive advantage over competitors. A good image also creates a basis for a long-term profitable customer relationship. Advance-expectations are created based on the field of business, business idea, implemented marketing actions, popularity, publications in the media and also good word-of-mouth creates good impressions into peoples' minds. Advance-expectations are not a result of one of these factors, but more like the sum of various factors (Rope & Pöllänen 1994, 31-33).

Third and last of these categories is the minimum-expectations that is the least that the companies should strive for survival. This category is very personal, dependent on a situation, dependent on the field of business and dependent on the company. The factors effecting advance-expectations also affect this category. This category is the one that evolves most in the time passing due to the rising education level, rising buying-power, competition, technical innovations and the increasing accessibility to media publications. Companies that don't follow this trend are falling behind, because the minimum-expectations are not the same as they were two years ago. Minimum-expectations are clearly based on companies' products' or services' functional features like quality, price, additional services and

durability. All these features should be kept above minimum-expectations in order for companies to maintain their position in the market and sustainable customer relationships (Rope & Pöllänen 1994, 35-37).

## 2.6 Customer loyalty

A loyal customer is very important to a company, not only, because they are great advertisements for the company through good word-of-mouth but also because they need less marketing for a repurchase. This improves the company's profitability and usually loyal customers bring in other regular customers (Lahtinen & Isoviita 1998, 64).

Ylikoski (2001, 173) thinks that customer loyalty is a requirement for a development of a long-term customer relationship. A long-term customer relationship is not get generated without focused and well targeted actions to develop a well grounded relationship. Not even the most effective marketing campaigns create customer loyalty by themselves. Customers remain loyal if they consider receiving superior added value from the company compared to a competition and if they have been satisfied with the company's previous performance.

Kotler (2006, 145) states that the link between customer satisfaction and customer loyalty is not proportional. If the satisfaction is rated using a scale from one to five and the customer rates the company as being one, customer is most likely to abandon the company and switch to using the competitors products. If the customer rates the company's performance between two and four meaning that the customer is fairly satisfied, but not loyal to the company when a better offer comes along. When the company is rated as level five the customer has an emotional bond built to the company and is very likely to repurchase the company's products while spreading good word-of-mouth (Kotler 2006, 145). The bond can be technical, geographical or economical (Grönroos 2001, 207).

Customer satisfaction should be measured regularly to clarify the rate of customer loyalty. When customers achieve level five on the customer satisfaction scale, they tend to stay loyal for a longer time and make repurchases more often. Loyal customers are more likely to buy all the new products or product up-dates for the existing models that the company introduces to the market. A loyal customer usually speaks for the company and their products' and does not pay attention to the competitors' products and is not as price sensitive as a new customer could be. Loyal customers are very keen on getting involved with the company's actions by giving feedback on the products and the overall company performance, services and image. They are also less costly to serve because they usually look for new releases from the company and due to the transactions that are more or less a routine (Kotler 2006, 145).

For a company it is much more cost effective to preserve current satisfied customers than to find new ones. The basic rule is that finding new customers increases basic service costs from five to six times more than the costs of maintaining the current satisfied customers. With current customers the basic service process proceeds smoothly and mistakes occur more seldom and therefore the service costs per customer decreases and the cost efficiency increases (Grönroos 2001, 183).

## 2.7 Customer satisfaction as a competitive advantage

Customers don't buy products or services, but they buy the benefits that the product or a service can offer to them. They buy offerings that consist of products, services, information and other factors. The value created from the purchase of an offering is dependent on how the customer experiences the benefits created (Grönroos 2001, 26-27).

Customer satisfaction can be developed on its own without any effort, but usually it needs work and planning. Customer satisfaction is a competition and tool, the competitive advantage received from customer satisfaction is hard to duplicate for other companies, especially if the company devotes more effort into their customer service than their competition. If the company's personnel have outstanding personal chemistry, empathy, helpfulness and they can offer other pleasant gestures towards the customers, qualities that are hard to imitate for other companies. Even the ability to apologize or react correctly to negative feedback can indicate a sense of professionalism to the customer and that the customer is taken seriously (Lahtinen & Isoviita 1998, 64). For many companies the situation nowadays is that their core competence needs to be refined into a service offering to develop their competitiveness and that the offering consists of all the value creating items that customers expect (Grönroos 2001, 37).

When the customer becomes a regular customer through positive experiences of the company's services the amount of visits usually rises due to the ease of the usage of the services. The company has the personal data of the customer and knowledge how to please the customer more efficiently; this also lowers the barriers towards the usage of the services. The customer does not want to go through the effort of switching the service provider and to go through all the steps to achieve the same position in the competing company again, this creates a competitive advantage for the company. The cost of the customer relationship decreases the longer the relationship is an increase of only 5 percent customer retention results in 25-100 percent profit on each customer (Ylikoski 2001, 180-183).

There are many benefits that a company can achieve through customer satisfaction, not only monetary benefits but also intangible benefits. When a regular customer is being served, the

time used in the process is much shorter than the time used with a new customer and the risk of misunderstandings decreases. This will make the customer more satisfied and the communion between the customer and the personnel more relaxed. When the company's personnel are able to serve happy customers, the atmosphere within the entire company raises the rate of satisfaction of the employees with it. When the employees of the company are satisfied, they tend to expend more effort in serving the customers and keeping the customers satisfied, making a cycle of satisfaction. The company needs to make the first effort in achieving the cycle (Ylikoski 2001, 183-184).

## 2.8 Maintaining customer satisfaction

Rope & Pöllänen (1994, 168) advise that customer satisfaction can be maintained if the three steps are followed:

1. Minimizing the factors creating dissatisfaction and ensuring homogeneousness in every aspect of the business activities.
2. Ensuring that all the factors creating dissatisfaction are replaced immediately with factors creating satisfaction based on customer feedback.
3. Trying to create small surprises for customers that would make them happy. Usually these are small but memorable things that create customer satisfaction. These small gestures are easy to execute within a service factor, product or within a process, but create a huge impact on the customer.

For Rope & Pöllänen (1994, 169), it is not enough to maximize the satisfying factors, but also the dissatisfaction factors must be minimized. Showing true willingness to serve the customer and expressing things to customer in a way that leaves no place for misunderstanding are ways to ensure successful communication. It is essential to explain thoroughly all the options that a customer has to ensure that the image of the company is maintained at the same level the customer had when entering the company's premises, or hopefully to improve it in every customer contact. This will guarantee that the company will be perceived as professional and trustworthy (Pesonen & Co 2002, 96).

Based on the theory presented here, questions emerge about the importance weight customers of wellness companies attach to the different elements of customer satisfaction. Investigating these matters reveals the amount of resources that companies are wise to invest in marketing or other business activities. Some of the invested resources, like money and time, are not profitable when the resources might really make a difference in some other use, such as better premises at a better location near the target market or some other

service creation elements that truly create value to the customer. These topics will form the framework for the questionnaire of the case study.

### 3 Case study

#### 3.1 The main questions concluding the theory

The main questions emerging from the theory concern how the overall experience has been perceived by the respondents and which parts are the most influential for the customer in terms of the image creation. In the conclusion of the case study the classical marketing mix of the 4Ps, product, and factors can be easily affected by the service provider. These four Ps help the service providers to improve their offerings; quoting Philip Kotler (2005, 16) “the job is not to find the right customers for your product, but the right products for your customers”. Most of the questions concern these four items in order to deepen how the perception of the customers is being created and which parts are the most valuable or the most vulnerable in the value creation process.

When looking at the first P, product, and in the terms of this case study the service, the question is whether being delivered to the customer as the majority of the service consumers would wish it to be. Is the service being provided so that the majority of the customers will get the most value from it, such as whether a broad product range is the thing that people value, the quality of the one main product or the occasional additions to the products. Also a significant question that emerged from the theory was how the consumption of the service could be made more convenient for the customers.

The pricing needs to be adjusted so that it corresponds to the value received from the consumption of the service. Therefore there needs to be an investigation of how much value on average the respondents tend to receive from these services and what are the factors that the service provider could improve to optimize the difference between the costs and gain but still give the best value for both the customer and the service provider.

The third factor of the marketing mix that needs to be examined is the place where service will be consumed and how the service can be conveniently accessed. The respondents might speculate according to the premises where the service is being provided and how easily the booking or the transportation to the premises can be accessed. Transportation and the surroundings of the premises could make a big difference to some customers that are used to do things in a special way and how big is the number of the respondents.

The last P, promotion, needs to be investigated so that most of the target market can be reached most efficiently. The respondents need to be asked how they usually search for the services they have used and what are the issues in the media that influences the most the images of the companies for the customer. On the basis of these results the service provider can increase how many people will receive the message the service provider sends to the target market, how to create the best first impression and maintain it.

### 3.2 Methods

The study was conducted by using customer survey as the research method and on anonymous questionnaire. The research concentrated mainly on what customers really appreciate when using health improving services like massage therapy. The questionnaire consists of fifteen quantitative questions about how the customers perceive services and one qualitative question for open opinions. Quantitative questions were used for the questionnaire to receive as wide range of answers as possible. The open question was added to ensure that if some question was missing from the questionnaire, the person would have the possibility to express it for the research. The questionnaire was sent to the respondents by email in the beginning of November 2010. The questionnaire was asked to be returned within four days. The questionnaire was conducted via email to ensure that the respondents are able to answer the questions whenever they have time to think, because it was not sure that all the respondents had used such services recently or maybe had not used them at all. 67 questionnaires were sent and 36 were received in time for the evaluation. The 31 questionnaires were not received due to the random selection of the respondents. The respondents were chosen randomly, therefore some of the email addresses could have been old, and some of the respondents have never used wellness services and therefore did not bother to answer the questionnaire. No incentives were used in this study that could have had an influence on the rate of the answers received.

The qualitative responses were read through and the objective was to receive respondents' ideas to improve services based on their previous experiences, but the number of open answers was so small that no ideas for improvement were developed. The answers received were basically opinions if the respondents were satisfied with the service they received. All the answers were inserted into an Excel-table and analyzed based on the amounts of same answers for each question.

### 3.3 Reliability

In this research the reliability was satisfactory due to the rate of responses received. The method of collecting the answers could have been better or the selection of respondents

could have been bigger to receive more responses for the case study. The number of responses received is close to a normal customer base of one medium sized wellness company therefore the reliability of the case study is rather reasonable.

### 3.4 Validity

The validity of the research is good. According to Koulutettujen Hierojien Liitto similar case studies have not been conducted previously. The questionnaire and the questions were designed to be easy to understand and answer so that as many as possible respondents would complete the questionnaire.

### 3.5 Background information of the respondents

As stated earlier the respondents to the survey were selected randomly. The first three questions were designed to receive general information about the background of the respondents, their age, occupation and their level of exercise. This was analyzed to investigate how much muscle tension could be involved in the decision to use wellness services. The gender of the respondents is not essential information for the case study and therefore not asked in the questionnaire.

28 of the respondents were over 50. years old, which is a significant number, but due to the random selection of the respondents the age selection could not have been influenced.

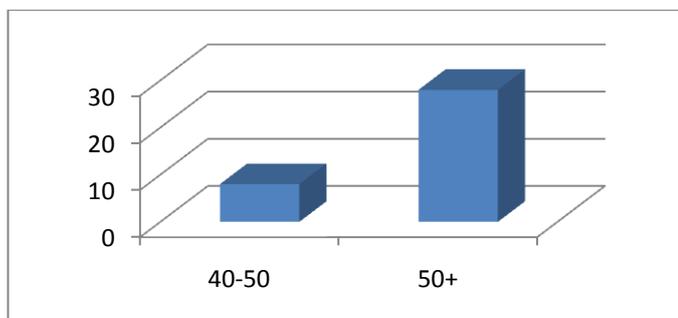


Figure 3: Age fluctuation

The second question on the questionnaire concerned the amount of the exercise respondents were engaged in. 78% percent of the respondents regularly participated in different kinds of sport activities and only 3 out of 36 were not involved in any exercise, leaving 5 stating little involvement with exercise.

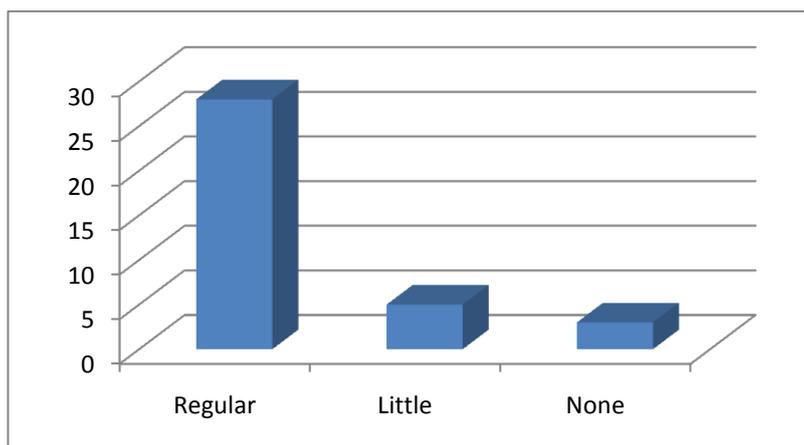


Figure 4: Participation in sports

The third question on background information was about respondents' occupation. Here all the respondents on pension were discarded leaving 41% of the respondent on office work. The remaining 59% of the respondents were involved with work that involves moving from place to place like janitors, sales representatives and teachers. The lack of respondents here was evident; therefore no clear trend could be discovered based on this information.

### 3.5.1 The frequency of use of the services

This section of the questionnaire was designed to investigate how much the respondents have used wellness services. The first question was designed to give an idea of how many times the respondents have used these services in overall. 95% percent of the respondents have used wellness services many times; the reason for this is the high average age of the respondents.

The second question was about whether the respondents have used the same company's services and the next two questions were about how frequently they have used the services. The last one of this section was about how homogenous the service was.

21 respondents stated that they have been loyal to one service provider and 17 of these have used same service provider for many years. Only 4 out of 21 respondents have gone to the same service provider more than 10 times, this suggests that these 4 are not using the services regularly.

Only 7 out of the 36 respondents use wellness services weekly, 10 on a monthly basis and the remaining 47 percent use them as little as once or twice in a year. There could be a huge profit making opportunity trying to change this 47% of the respondents into regular users.

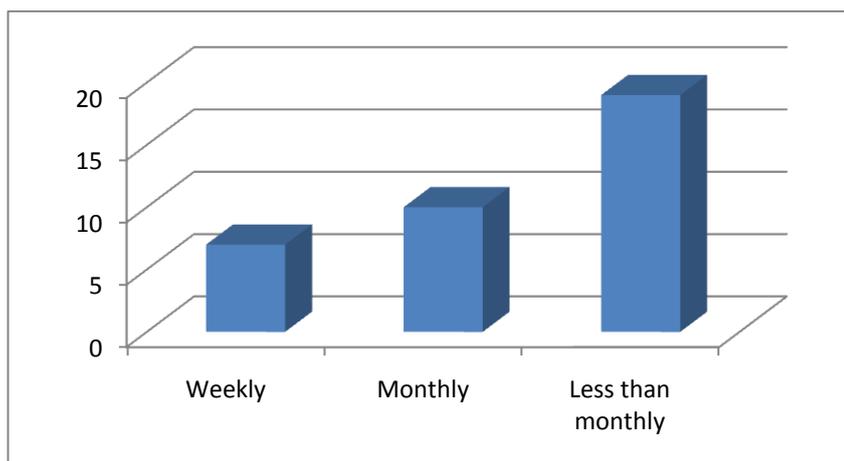


Figure 5: Usage of wellness services

The last question of this section was designed to investigate how homogenous the services the respondents received have been. 72% of the respondents claimed to have had very homogenous services and the remaining 28% consist of the people that have not gone to the same service provider regularly; therefore their claims have little validity here. This question suggests that the average quality of services in the field of wellness services is rather good.

### 3.5.2 The selection of the service provider

The second set of questions was designed to investigate the motives of the respondents that choose a particular service provider. There were five different questions where the respondents were asked to answer yes or no if the question did or did not affect the choice of the service provider.

The most influential factors claimed by the respondents claimed to be were location with 81% and friends recommendation with 72%. Then the second most influential factors were image and the overall service selection of the service provider. The least influential factors according to the respondents were the surrounding services of the location of the service provider's premises.

Some of the respondents, less than 8%, left some parts unanswered due to the fact that some of the respondents had the service provider come to their office or home, therefore these questions did not concern them.

### 3.5.3 Questions 3 and 4 concerning the location of the service provider

With question number three, the respondents were asked which factors are valued by customers concerning the location of the service providers. 56% percent stated that the time used for the trip to the location is the most important; the location must be in a convenient place for the customer. A parking place near the service providers' premises and easy access with public transportation were valued by most of the respondents. Only 19% claimed that these matters do not make any difference to them.

Question number four was designed to investigate if the respondents are willing to travel further for maybe a little cheaper service provider or if the respondents are willing to pay a little more for services in a more convenient location for their daily routines. 56% of the respondents claimed that the service provider should be near their home or work so that the respondents do not need to make a detour to their daily routes. Again 19% of the respondents claimed that this matter does not make any difference to them. These respondents were most likely to be the same ones as in the previous question. Also 19% of the respondents claimed that only quality matters, meaning that they are willing to travel longer distances for better quality than some local service provider could offer.

These questions suggest that the accessibility to the service provider needs to be really easy and the respondents are not willing to put much effort in to receiving the service. Location should be within crowded living areas where there are loads of people living within walking distance, but still a car park and public transportation is essential to the customers coming from a distance.

#### 3.5.4 Finding the service provider

As a fifth question the respondents were asked to state how they found their service provider. Most, 53 percent, of the respondents stated that their vicinity was the biggest influence on finding the specific service provider for them. Also other three important matters affecting the choice when looking for service provider were internet, local newspapers and an appealing store window. Two of the respondents said that a hotels reception recommended a service provider for them.

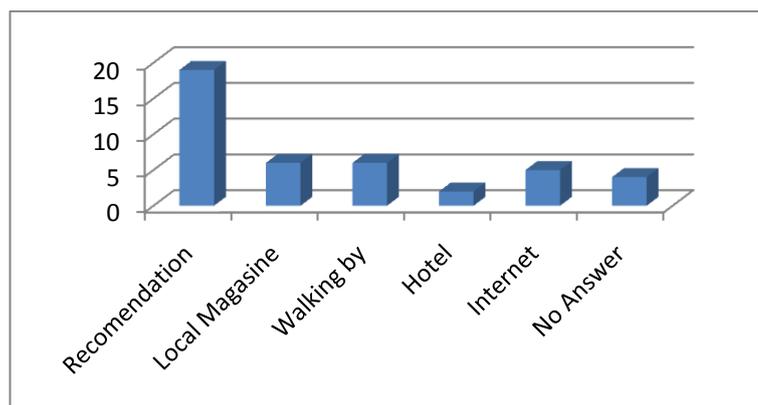


Figure 6: How did the respondents find their service provider

These findings reinforce the assumption that good word-of-mouth is the best marketing tool for a small business. Good word-of-mouth can be strengthened with good internet coverage; by using these properly the service provider could attract almost 70% of the respondents.

### 3.5.5 The range of the service offerings

The respondents were asked if the service provider has any additional services provided to their core service, for example Indian head massage, hot stone stimulation, acupuncture etc. 53% of the respondents stated that the service provider did not have any supporting or additional services to offer besides their core services.

41 percent of the respondents stated that their service providers had some additional services to offer and 87% of these respondents have used these additional services. This clearly states that people most likely use other additional services if these are offered. This also states that if the service provider cannot offer their customers any variability in their service offerings, customers might start looking for a new service provider at some stage and some potential customers might go elsewhere if traditional methods are not appealing to them.

### 3.5.6 The additions to the core service

Sometimes a small endowment can make a big difference. A small extra gesture, like offering a bottle of water to the customers that they were not expecting in addition to the core service, will make the experience for the customer more memorable and can produce repurchases through positive previous experience.

67% of the respondents claimed that no extras were offered to them besides what they paid for, but also 61% of all the respondents stated that they were not hoping for anything. There

are still the rest of the respondents that stated that something extra, like a cup of tea or a glass of orange juice, would be nice. There could be a great chance to exceed the customers' expectations, especially when all the extras like a bottle of water are tax deductible.

#### 3.5.7 The opinion of the services near the respondents' homes or work

This question was designed to clarify the respondents' perception of services in neighboring areas. Most, 91%, of the respondents were used to using services near their work or home.

#### 3.5.8 The opinion of the gender of the service provider

This question was designed to investigate if there could be a clear trend that could be exploited, but 89% of the respondents claimed that it does not matter at all. Some of the respondents seemed a little offended by the question.

#### 3.5.9 The habit of recommendations

All the recommendations are free marketing for any company; these are essential especially to small businesses with small budgets and all the savings are clear profits for the entrepreneur. The respondents claimed that only 13% have not recommended their service provider to anyone, but in this case these respondents have most likely been on holiday, so there is no continuity in the customer relationship.

#### 3.5.10 The reasons for seeking wellness services

This question was to clarify the motives of the respondents in seeking wellness services. 83% of the respondents used wellness services of their own will, but 33% of the respondents also stated that a doctor had recommended seeking for help from wellness service providers.

#### 3.5.11 Preferable opening hours

The 12<sup>th</sup> question was designed to investigate which opening hours would attract most customers. This was the first question, which really created most dispersion amongst the answers.

Only 19% of the respondents claimed that mornings and afternoons would be most preferable for them, when 36% preferred evenings and 16% preferred weekends. Flexibility with opening hours was highly valued with 15% of the respondents. The rest of the respondents claimed

that all the opening hours suit them. Flexibility and evenings with opening hours would bring in most customers.

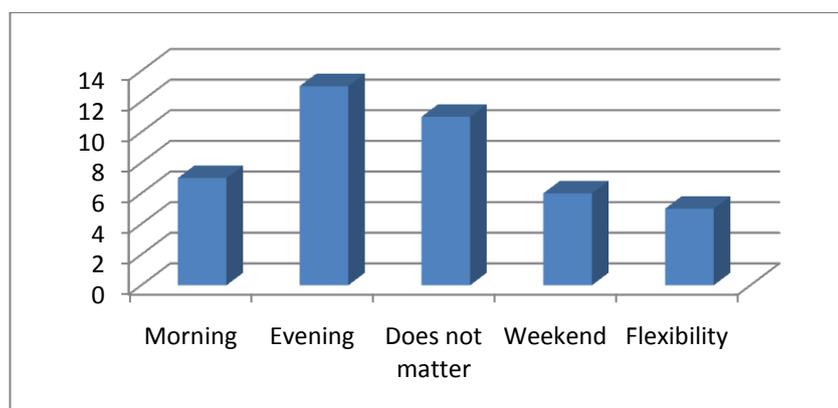


Figure 7: Preferred opening hours

### 3.5.12 Average spending on wellness services

In general (45%) the respondents were used to spending 30 to 50 Euros on their services, where 28% were used to spending over 50 Euros. The amounts spent on wellness services are rather high even spent on a monthly basis, but it must be remembered that most of the respondents were from the Helsinki area where wellness services are more expensive than in other cities.

However, 17% of the respondents did not answer this question and only three out of all the respondents claimed they were willing to pay less than 30 euros. The number of the respondents not giving an answer was so high, was probably due for using free vouchers that people are used to giving each other for presents. Also some companies subsidise their employees' visits to wellness centers.

### 3.5.13 The perception of the premises of the service provider

In this question the respondents were asked four different things about the service provider's premises and how the respondents value them. Cleanliness was highly valued by 31% where 63% claimed to only value cleanliness. The appearance of the service provider was also highly valued by 25% of the respondents, 69% claimed only valuing it. 25% claimed that they do not care about the interior of the premises while only 3 of the respondents emphasized the importance of the interior. Therefore it could be said that it does not matter what the interior looks like as long as everything is clean and the service provider is neat.

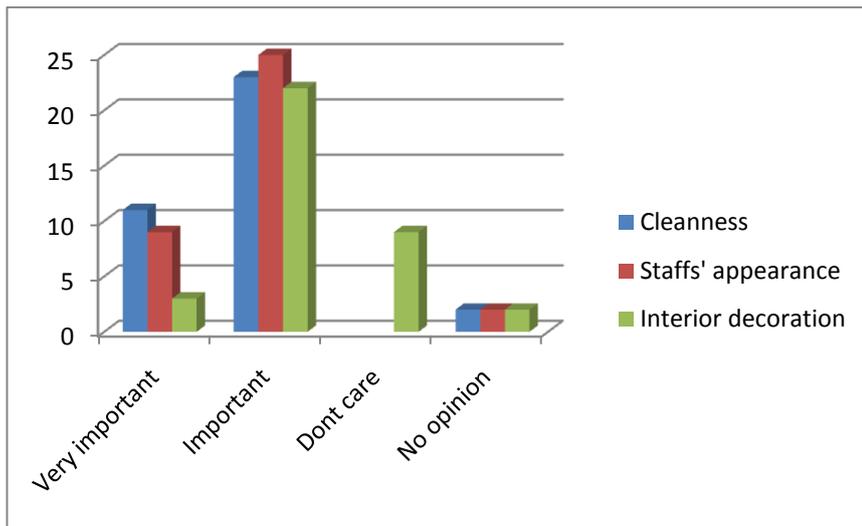


Figure 8: How people value the premises

In the end of this section the respondents were asked if they prefer music in the premises. This question also created lots of dispersion. 39% of the respondents claimed enjoying complete silence while 25% enjoyed music while using services. Many of the respondents also said that they would like music if they could choose what to listen to. On the basis of this question could be said that it would be polite to consult the customer about the music, this also indicates that the service provider truly cares about the customers' opinions.

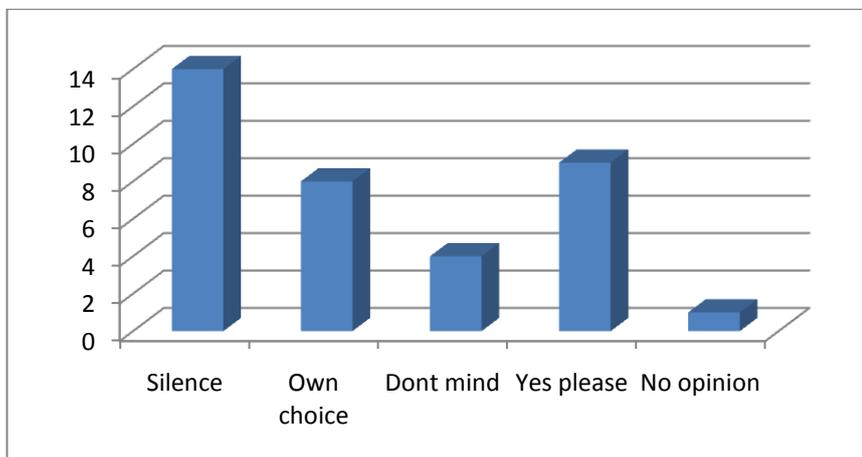


Figure 9: Music preferences while consuming the services

### 3.5.14 The booking for the service appointment

This question was designed to investigate the trend concerning booking for the appointment. The study indicates clearly that the telephone is still the most commonly used and most

preferable means of booking appointments. Only a small number (22%) of respondents claimed to be ready to go online to book their appointments by email or use an internet booking system. These results really suggest that people still want interaction with a physical person. It is hard to negotiate about things via email because getting answers is time consuming. Benefit from internet booking systems for the customer is the ability to see directly all the available appointment times, but this seems rather rare system probably due to the expense. The respondents were also asked if they received service easily. Only 6 respondents complained about not getting service easily, remaining respondents were satisfied about how they got service when booking the appointments.

#### 3.5.15 The involvement of the customer to the flow of the service

For the last quantitative question the respondents were asked about the progression of the service. These questions were designed to investigate how the customers got to affect the execution of the service. First the respondents were asked if they got to affect the force used in the implementation of the service, where only 13% said that they did not, which still is quite a number, meaning that 13% were not satisfied with the service. Also 25% of the respondents complained that they were able to affect the position while getting the service. Some of the people got queasy in some position; therefore the customers needed to be consulted when setting the position for the service.

The next question was about whether the respondents were offered any heat or cold treatment. Only half of the respondents said that they have been offered the treatment, there is a clear opportunity for improvement. These heat treatments are most likely to be popular especially during the cold winters and cold treatments for inflammations.

The two last questions were designed to investigate how well the service provider took care of continuum. Only 55% of the respondents claimed that they were offered new appointments and only 64% were offered home treatment instructions. Almost in 40% of the cases the continuum was neglected and consequently missed out on almost certain repurchases.

#### 3.5.16 Open question

The last question on the questionnaire was the qualitative section, therefore not really a question, but a place for respondents to state their own opinions and thoughts if they wanted to share something else than this questionnaire covered.

Only a few respondents wrote something in this section and commonly stated their satisfaction towards their service provider. Five other thoughts were brought up from this

section where three of the respondents shared the same thoughts wanting to emphasize their desire for silence while receiving a service. Also three other of the respondents wished to receive some refreshments due to low blood pressure and gain fluids after a intense massage or some other physical service.

The last three matters that were brought up by this section concerned the services as a whole. One of the respondents wished for more alternative forms of healing that indicates the willingness and need for wider selection in the forms of healing. Then one of the respondents complained that sometimes the service provider in a massage therapy did not apply enough force to satisfy the customer's wishes. The last thing that was brought up from one of the respondents was the wish for home instructions for the customer to keep the healing process going on even after receiving the service.

#### 4 The conclusions

The purpose of the study was to investigate how customers perceive wellness services and based on the responses to the survey suggestions for improvements are made according to the 4Ps marketing mix theory. The results of the survey suggest that the respondents were mostly rather satisfied with all aspects that the survey covered about the services that the respondents received. The positive feedback received from the survey indicates that the respondents' expectations have been met in general, but this still does not suggest that there are no issues that need or could be improved.

##### 4.1 Product

The survey already indicated the first question that the quality of the services is good according to the respondents. According to the survey the overall number of different service offerings could be bigger. Additional services would offer variability to the customer and also to the service provider, otherwise the service could become too much of a routine and customers could start searching for alternative services elsewhere. The respondents claimed that the ones that go to a place where there are additional healing services only two have not used these services; therefore people seem to be willing to use these services. Additional services might only increase the customer base, but would not evict anyone.

A wide range of different offerings indicates true dedication to the field of business raising the image of the company which was important to 50% of the respondents. The question 4 indicated that 19% out of the respondents were willing to travel longer distances for better quality of services, meaning that the ability to satisfy customers' needs in different ways and on different levels could attract customers from a distance. Small things like offering heat

and cold treatments could make huge differences to the customers when the survey indicated that only half of the respondents have ever been offered such treatments.

The booking of the service is an important part of service. Without properly operating a booking system the service provider could lose customers when they get frustrated with trying over and over again. The results from the survey indicated that only 16% of the respondents claimed to not get a service easily indicating that booking system overall is in good condition. Booking by telephone is still the most commonly used method, but this is rather time consuming to the entrepreneur especially if he/she should be serving the customers in the premises, unless they have an answering system or secretary, but even then they might have to call back to the customer. 22% of the respondents stated a willingness to use both email and internet booking, but emails also need the service provider to confirm the booking to the customer, when with internet booking customers could see all the available times and could book them directly as they wished. Internet booking could take over the customers using emails quite quickly making internet booking the second preferable way of booking with 45% of the respondents. Internet booking could also free the service provider from the need to answer the phone all the time giving them more time for other things.

#### 4.2 Price

According to the survey the respondents were willing to spend 30 to 50€ on the wellness services, while 27% of the respondents were willing to use more than 50€ on the services. Respondents spending more than 50€ on their services most likely want something special as an addition to the basic services like an Indian head massage after a normal back and neck massage. These customers are going to go somewhere else if the service provider cannot offer them anything extra. With a frequent user card that would offer discounts to the customer, then even the most price sensitive, 10% of the respondents, could be attracted to frequent users and bound to use the service provider.

The survey indicates that the service provider will attract most customers in a location near a huge customer base even though that prices would need to be set higher than in a location a bit further away, the most important thing the customers are willing to pay for is ease access to the services.

The survey also indicated that more than 50% of the customers claimed rather using a wellness service during the evenings and weekends and 19% during the mornings and afternoons. Around 30% of the respondents don't care when they get to use the services. These results indicates that flexibility with the opening hours would be most profitable and the morning opening hours the least profitable.

### 4.3 Place

The premises should be selected on the basis of the surroundings. The premises should be chosen where there are the most potential customers as near the premises as possible, urban areas and close to heavily populated apartment building areas seem to be the most profitable according to the survey. Most of the respondents stated that they like to use services near their work place or near their homes, therefore shopping centres and city centers are not likely places to attract customers. Only 13% of the respondents claimed that the surrounding services of the service providers' premises influences their decision when choosing the service provider, indicating that the premises could be on the ground level of an apartment building giving good exposure to the people living near for free and the lease of the premises could be much cheaper than in a shopping centre or such without being dependent on the surrounding facilities attracting customers.

The premises need to be conveniently accessible, so that the customers do not need to use extra time just to be able to enter the premises. Even though 99% of the respondents claimed that they like to use local nearby services and 55% of the respondents choose their service provider according to the time need to be travelled, still 44% of the respondents valued the possibility of a car parking space and accessibility with public transportation. Accessibility from a distance should also be taken into consideration when choosing the premises, because these are the customers that make an effort to be able to use these specific services and likely are willing to pay well for the services.

According to the survey the overall image of the company is not the main subject people look into when deciding on the service provider, but the cleanliness of the premises is the most important factor for most of the respondents. The fact that 30% out of 96% claimed that cleanliness of the premises is the most important factor emphasizes the importance of this aspect. Also the interior decorations were an important factor for 69% of the respondents. This indicates that the only image building that wellness improvement service provider needs comes through clean and pleasant interior of the premises.

### 4.4 Promotion

According to the results of the survey the only promotion a small wellness improvement service provider needs is good customer relationships offering positive word-of-mouth, internet website, advertisement in local newspaper and appealing window decorations. According to the survey the most influential and cheapest marketing method is good word-of-mouth. 72% of the respondents were influenced by someone else's recommendation and 52%

claimed that they have chosen their service provider according to someone else's recommendation. Therefore by offering customers something that they have not been expecting, like a bottle of water or a cup of other refreshments could make a difference when striving to exceed customers' expectations, especially when 61% of the respondents were not expecting anything extra from the service provider. In addition the majority of the respondents stated that the local paper is the first place where they would search for service provider and then the internet, and also that the choice is often made when passing by the service provider's window. Local paper offers exposure to the target market for a low cost and internet offers exposure for all the people searching the internet for the service provider, e.g. the people that have heard recommendations and are searching for additional information. The display window is also a rather important item to invest in, because it gives the first impression of the company and when customers are leaving the premises it is the last thing they will see.

The survey indicated clearly that only half of the respondents were frequent users of wellness improvement services, which means that there is a huge opportunity to convert random users into frequent users by offering them, for example, cards that are prepaid and entitle the customer to get ten massages for the price of nine. Cards like these would tie the customer to a specific service provider and for the most price sensitive customers this would offer a rather good discount. Also cards like these would decrease the need for advertising, when the customers are tied to the service provider.

Advertising is still an important way to attract customers, because 83% of the respondents seek help spontaneously and then the service provider needs to be easily found. In the advertisements should be mentioned all the factors that the potential customers could value and could be favorable to the service provider such as parking space, public transportation connections, alternative healing services, opening hours and booking system. Advertising and co-operation with local healthcare centers and doctors' offices could also be profitable when 33% of the respondent have sought for help due to doctor's recommendation from wellness improvement services.

#### 4.5 Future surveys

This survey also can and should be conducted on a steady basis over the years to monitor progress of the improvement of the quality of the services. Trends are evolving all the time therefore the service providers need to be able to react to these changes accordingly. The number of the respondents could have been better, so that the results would have been based on wider range of opinions and younger respondents should be questioned in the future. Also use of incentives in the future could improve the rate of responses.

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## Appendixe 1 Questionare

Hyvä vastaanottaja,

olen Markus Ihalainen, tradenomi opiskelija Leppävaaran Laureasta. Nyt tarvitsisin hieman teidän apua lopputyöni loppuun saattamisessa. Lopputyöni aiheena on ”kilpailukyvyyn luominen asiakastyytyväisyyden kautta” ja tutkimus tuotetaan yhteistyössä Koulutettujen hierojien liiton kanssa (KHL.fi). Tutkimuksen tavoitteena on luoda toimiva ja hyödyllinen toimintamalli pienille hoitoalan yrittäjille, asiakastyytyväisyyden mittaamiseen ja jonka pohjalta he voivat kehittää toimintaansa ja asiakaspalveluaan nyt ja tulevaisuudessa. Nyt tarvitsisin teidän apua täyttämällä alempana olevan asiakastyytyväisyys kyselyn, jotta saan vertauskohteita raporttini tekemiseen.

Kyselyyn olisi toivottavaa jos vastaukset olisivat mahdollisimman lyhyitä: kyllä / ei / ehkä, tyylisiä tai numeroilla. Tosin jotkut kysymykset vaativat hieman selitystä, mutta niidenkin kohdalla olisi toivottavaa pysyttäytyä yhden tai kahden lauseen mittoissa.

### Perustiedot:

Ikä:

Toimenkuva:

Harrastukset:

### Itsekysely:

1. Oletko koskaan käyttänyt hierojan (vastaavan) palveluita?

- monta kertaa käyttänyt:
- Kävitkö samassa paikassa:
- Kauan käynyt samassa paikassa:
- Kuinka säännöllisesti käyttänyt palveluita:
- Onko palvelu ollut tasalaatuista:

2. Millä perusteella valitsit paikan, millä edellytyksin:

- Liikkeen palvelukokonaisuus:
- liikkeen sijainti:
- muut läheiset palvelut:
- Liikkeen imago:
- Tuttavien suositukset:

3. Onko mielestäsi liikkeen sijainnilla merkitystä? Esim. Julkinen liikenne/parkkipaikka...

7. Mitä arvostaisit eniten keskeistä sijaintia vaikka palvelun hinta olisikin korkeampi kuin hieman kauempana oleva palvelupiste:

- matka minkä valmis matkustamaan

4. Miten löysit paikan? Internetti, lehti, näyteikkuna, muu mikä:

5. Onko/oliko paljon erilaista palvelutarjontaa? Intialainen päähieronta, akupunktio, yöhyketerapia...

- Oletko hyödyntänyt muita palveluita:

6. Sisältyikö palvelun hintaan extraa? Vesipullo, kahvi, kylpytakki, suihku jne:

- Olisitko halunnut/kaivannut jotain, mitä:

7. Oletko tottunut hyödyntämään kotialueesi/ työpaikkasi lähiseudun palveluita:

8. Onko mielestäsi palvelun tarjoajan sukupuolella merkitystä:

9. Oletko suositellut palvelun tarjoajaa muille:

10. Mikä ajoi hoitoon? Lääkärin kehotuksesta, oma tahto:

11. Millaisia aukioloaikoja arvostaisit eniten? Onko päivät hyviä sinulle vai kävisitkö mieluummin iltaisin tai viikonloppuisin:

12. Mitä olet tottunut maksamaan hoitoalan palveluista, täyttä hinnastoa ei tarvitse muistaa, mutta suunnilleen mitä olet maksanut mistäkin palvelusta:

13. Miten olet kokenut liikkeen/liikkeiden ilmapiirin?

- siisteys:

- työntekijän olemus:

- sisustus:

- musiikki? oli/ei/ ei haluttu:

14. Kuinka ajanvaraus onnistui?

- Internetti:

- puhelin:

- Email:

- saiko helposti palvelua:

- Millainen ajanvaraus sinulle sopii parhaiten:

15. Pääsitkö itse vaikuttamaan hoidon kulkuun?

- Hierojan/vasttavan voiman käyttöön:

- Palvelun suorittamisen asentoon? Makuu, istuen jne.

- Lämpöhoitojen käyttö? Kylmä, lämmin jne:

- Tarjottiinko jatkumoa hoitoon? Kotihoito-ohjeet, uusinta käyntiä:

16. Mitä jäit kaipaamaan? (Vapaa sana):

Kiitos paljon vastauksistanne,  
ja mukavaa talvea:

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