

# Wendy Yeh AskWY Marketing and Research

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DISCOVERING  
OPPORTUNITIES FOR YOUR  
BUSINESS

# Background

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I take every opportunity to incorporate my 20 years of research and marketing skills into solving everyday problems. Regardless of the industry, my curiosity has allowed me to identify who is the target customer, improve the customer experience, enhance a company's brand equity, develop new product offerings, and develop targeted marketing communications.

I specialise in the following sectors:



Banking and  
Insurance



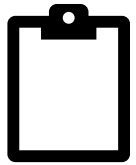
Retail including  
Grocery



Charities and  
Non-profit

# Services Offered

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Questionnaire design,  
programming and reporting



Focus group design and  
moderation



In-depth interviews with customers or  
internal stakeholders



Scanning and reporting of  
secondary research findings online

# Examples of Retail Research

RESEARCH	FREQUENCY	WHY DO IT?	ROI
Customer Satisfaction Survey and In-depth Interviewing	Ongoing	<ul style="list-style-type: none"><li>• Identify if your customers are satisfied with your products or services.</li><li>• Determine if your customers are advocates or detractors.</li><li>• Identify what products and services need improvements and mitigate any potential disasters.</li><li>• Identify new products and services desired by your customers.</li></ul>	<ul style="list-style-type: none"><li>• Understanding your customers satisfaction drives loyalty, thus repeat purchases.</li><li>• Loyal advocates of your business helps recommend your business to others.</li><li>• Loyal customers also help provide suggestions to help improve your products and services.</li></ul>

# Examples of Brand Research

RESEARCH	FREQUENCY	WHY DO IT?	ROI
Brand tracking and customer profiling	Once or twice a year	<ul style="list-style-type: none"><li>• To understand how your brand compares to other similar brands.</li><li>• Understand if your customer profile changes from year to year. Helps to explain why it stays the same or why it may change.</li><li>• Assist in developing new marketing campaign with messaging that resonates with your target market.</li></ul>	<ul style="list-style-type: none"><li>• By understanding your brand and its appeal compared to other competing brands, allows your business to be more competitive. Where can you steal market share? How can you more competitive to attract more customers?</li><li>• Strategic marketing by allocating marketing budgets to acquisition campaigns that incorporates messaging resonating with potential customers.</li></ul>

# Examples of Charity Research

RESEARCH	FREQUENCY	WHY DO IT?	ROI
Annual Donor Survey	Annual	<ul style="list-style-type: none"><li>• Identify your core donors in terms of demographics, attitudes, lifestyle.</li><li>• Why and how do they donate to you?</li><li>• Assess awareness, loyalty, and competition.</li></ul>	<ul style="list-style-type: none"><li>• Understanding the trends of your donors wants and needs, helps the organization plan marketing communication tactics and messaging.</li><li>• You can be more strategic with your marketing dollars to maintain and grow your donor base.</li></ul>

# Examples of Charity Research

RESEARCH	FREQUENCY	WHY DO IT?	ROI
Donation Feedback Survey	Ongoing	<ul style="list-style-type: none"><li>• Assess the donation process.</li><li>• Capture demographic and motivations.</li><li>• Solicit feedback on how to improve or enhance loyalty.</li></ul>	<ul style="list-style-type: none"><li>• Prevented the loss of 8-10% of online donations just by actioning donors requests.</li><li>• Identified donors who had difficulty with payment and rectified the situation preventing more loss.</li><li>• Platform functionalities were built based on donor feedback that help generate 2-3% more additional donations.</li></ul>

# Examples of Charity Research

RESEARCH	FREQUENCY	WHY DO IT?	ROI
Canvassing Feedback Survey	Ongoing	<ul style="list-style-type: none"><li>• Assess the quality of canvassers.</li><li>• Assess commitment level of new signed donors.</li><li>• Identify metrics of why a donor signed on.</li></ul>	<ul style="list-style-type: none"><li>• Attrition rates declined 2%-5% within the first three months.</li><li>• 14% in cost saving in canvassing fees</li><li>• Prevent attrition by accommodating downgrades or one-time gifts.</li></ul>
Development of communication assets using one on one interviews.	As needed	<ul style="list-style-type: none"><li>• Understand what communication assets appeal to donors and why.</li><li>• Identify what donors pay attention to.</li><li>• Identify the media channels used by donors.</li></ul>	<ul style="list-style-type: none"><li>• Helps to retain new donors as they see value in the messaging provided.</li><li>• Assist in budgeting by asset determined by donor preference.</li></ul>



# Testimonials

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*“Working with Wendy has been an absolute privilege and an enlightening experience. Her dedication, expertise, and tireless commitment to building the research program at the Canadian Red Cross have truly been remarkable. Wendy's insights have helped establish the way we approach donor research, allowing us to understand our donors in a different light and transform the overall donor experience in ways we could not envision before.*

*Through Wendy's expert hands, the research program has flourished, yielding valuable insights that have informed strategic decision-making and enhanced the effectiveness of our initiatives. Her ability to draw out meaningful yet nuanced insights for our fundraising teams and with external partners has been instrumental in driving impactful outcomes.”* **Elaine Wong, Associated Director of Retention and Customer Experience, Canadian Red Cross**

*“Wendy would be such a valuable asset to any team, always digging deep into donor feedback and unearthing insights that help to make smarter decisions. Her dedication to research is truly inspiring, and her ability to translate complex data into actionable strategies is invaluable. Her passion for understanding donors/customers and their needs is contagious, and she will surely lead anyone who works with her to be more customer-centric in their approach, thus achieving higher success in any market.”* **Melanie Fulop, Senior Manager, Integrated Direct Marketing, Canadian Red Cross**

*“Wendy's expertise in Market Research is indeed crucial for helping businesses understand market dynamics, identifying opportunities, and addressing threats. She is instrumental in leveraging data to inform strategic decisions, leading to revenue growth and risk management..“* **Nadim Sayed, Engagement Manager, McKinsey and Company**

# To Learn More

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## **Wendy Yeh**

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