

Net Impact 2004: From Connectivity to Productivity



German Public Sector

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High Impact

Net Impact 2004 studied the effect of various **Internet applications, networking technologies, business processes and organisational behaviours** by measuring 12 operating metrics that are drivers for four broad productivity outcomes.

Overall, companies that implemented the best practices identified for each productivity outcome in *Net Impact 2004* study experienced an average 3-7 times greater improvement than their peers who did not use all of the identified best practices.

Key Findings:

- More **German organisations focused on cost reduction** than service expansion or citizen satisfaction
- **Emphasis on cost reduction could be counterproductive**, leading to reduced citizen satisfaction
- Doubling the number of citizens using services results in a **45% increase in citizen satisfaction** and a **10% reduction in annual operating costs**.

Productivity is a deep-rooted and frequently discussed concept by both corporate and political leaders. In recent years productivity has become a leading economic statistic and figures prominently in decisions about interest rates, wages and fiscal policy. As a result, productivity numbers are used at the macro-level for GDP estimates and as an input to many government programmes.

Europe's public sector organisations are focusing more on productivity as they work to improve the quality, scope, and cost of citizen services. These improvements come from small, incremental innovations in specific business functions. But which innovations? What are the key areas of investment and best practices for German public sector organisations? In an attempt to answer these questions, Cisco sponsored *Net Impact 2004: From Connectivity to Productivity*, a study of European public sector productivity conducted by Momentum Research Group.

Net Impact 2004 is the fourth in a series of research projects evaluating the impact of Internet technologies on organisations. The first two studies quantified the macro-economic impact Information and Communications Technologies (ICT) have had on the national economies of the U.S., UK, France, Germany, Italy and Canada. The third study identified technology and organisational practices that enhanced productivity within the Customer Service & Support, and

Sales functions of over 300 U.S. companies in multiple vertical markets. The objective of *Net Impact 2004* was to identify similar business process and technology practices that are accelerating the citizen services productivity of public sector organisations in eight European countries.

This article provides an overview of the German results of *Net Impact 2004*, based on data from local, regional and national government offices, as well as multiple types of public healthcare providers. To qualify for the study, the organisation had to be a "Connected Organisation", defined as having one or more active enterprise business applications distributed through their network. In all, over 1400 ICT and business decision-makers participated from the following eight countries: France, Germany, Italy, the Netherlands, Poland, Spain, Sweden, and the UK, including 200 from Germany.

Net Impact 2004 found that organisations that invest in (and align) their process re-engineering, Internet business applications and network infrastructure achieve significantly greater productivity enhancements in their eGovernment projects. However, the study also revealed that a disproportionate emphasis on cost containment may lead to unintended results in other key metrics of productivity, such as organisational effectiveness and citizen satisfaction.

What does productivity mean for German Public Sector Organisations?

Many studies of productivity use a single macro-level measurement – often financial or labour-based – to determine productivity gains. Since each organisation faces different environmental conditions and has unique goals, these abstract measures rarely help decision makers understand what actions they can take to improve their productivity.

To accommodate the uniqueness of each organisation's situation, *Net Impact 2004* sought to understand what induces Germany's public sector Connected Organisations to make investments in networking, applications and business processes. What are the specific improvements they are trying to achieve? What actions have they taken? Are these primarily cost-saving activities, or are there other reasons in mind? How do their efforts relate to the aims of the European Commission's [eEurope 2005 Action Plan](#)?



Source: Momentum Research Group—Net Impact 2004

Figure 1: Top Productivity Goals

Perhaps surprising, the potential for cost savings is not the primary intent of the eGovernment efforts in most public sector organisations. Cost savings is not even one of the top five reasons for organisation initiatives across Europe, but in Germany it ranked number two. The top goals fall into three broad categories: efficiency; services; and financial.

The primary driver of eGovernment programmes in the surveyed organisations is service efficiency. Accelerating the speed of the organisation and improving citizen satisfaction were the most common goals, which was cited 79% of the time. Although Germany reported similar results to Europe for accelerating the speed of the organisation, improving citizen satisfaction showed a noticeable drop in significance (78% Europe vs. 65% Germany).

The next group of goals are related to service delivery. On average, 72% of organisations are interested in broadening the reach of services to include more citizens

(with existing resources) and innovating to deliver new services and address new citizen demands. The results show that German organisations are less concerned about expanding services with existing resources (60% vs European average of 72%) and meeting new citizen demands (55% vs 72%). This lower focus on service volume may be affecting other desired outcomes, as will be explored in more detail.

Completing the list is of course the potential for cost savings. Germany places a slightly higher emphasis than the average European organisation on cost savings; *Net Impact 2004* found that this emphasis carries some risk: organisations that focus on cost savings through formal measurement systems may be saving money at the expense of citizen satisfaction.

Significant productivity gains possible

Earlier *Net Impact* studies found that organisations using Internet business applications achieved single-digit productivity improvements, measured as a reduction in operating costs, over ones that did not adopt technologies. Subsequent *Net Impact* studies demonstrated that applications and other technologies are not the sole sources of organisational improvement. Productivity results from inputs working together including business processes, applications, network infrastructure as well as factors such as worker skills, choice of tools, and the general business environment.

Initially, *Net Impact 2004* attempted to identify a universal set of best practices that Connected Organisations could use to improve productivity. However, every organisation has different operating targets, requiring different actions. For example, the best practices for containing costs are different from those for increasing services volume. Therefore, a set of best practices was identified for four productivity themes:

- Efficiency;
- Services volume;
- Financial improvements;
- Citizen satisfaction.

A corporate action was identified as a best practice if it had a strong (statistically significant), predictive relationship with one of the 12 operating metrics tracked. Detailed information on the metrics and the best practices identified for each productivity outcome is available in Appendix A.

The study uncovered significant differences between goals and outcomes of German organisations relative to the European average. Despite significant investments in applications, processes and technology, German public sector organisations fell short of the best practice levels of improvement in some key metrics of productivity.

Show us the money

Relative to their European counterparts, German public sector ICT decision-makers placed a far higher priority on using technology to achieve cost savings than on efficiency or citizen satisfaction. However, there was no corresponding difference in cost savings. Germany experienced a modest increase in citizen service operating costs over the last 12 months – a 2 percent greater increase than all of the countries not focusing on reducing costs.

The opportunity for savings is significant. *Net Impact 2004* showed that organisations that invested in appropriate network technology, business processes and network applications realised an average of 20-30% reduction in operating costs. Prudent network engineering practices such as providing sufficient network capacity for application upgrades planned in the next twelve months, and deploying sophisticated traffic management tools, contributed significantly to cost containment efforts.

If a greater percent of German organisations have been asked to reduce costs via technology investments, why have they not experienced greater savings? German organisations' adoption of the cost containment best practices contains some important clues to answer this question. The study indicates that **the primary drivers for cost reduction are the percent of cases resolved through self-service and the number of citizens using the service**. Doubling either of these metrics translates to a 10% or greater reduction in annual operating costs, as well as a greater than 20% increase in citizen satisfaction.

Increasing revenue requires a different set of practices than those most effective at containing costs.

Implementing a comprehensive disaster recovery solution was a networking best practice Connected Organisations used with the most significant increases in revenue over the last 12 months. A network that is down cannot collect money, and an organisation unprepared for unexpected network events will require more time for recovery, compounding revenue loss.

Ironically, a strong focus on cost reduction may have a negative impact on customer satisfaction. *Net Impact 2004* found that organisations formally tracking general annual operating costs could experience citizen satisfaction improvements 6-8% lower than their peers.

Citizen Satisfaction?

Citizen satisfaction is measured by most organizations. In order to rapidly increase citizen satisfaction, two areas organisations should focus on are 1) getting more people to use their services, especially online, and 2) focusing on quicker turnaround times for citizen requests. German organisations place less emphasis on both of these metrics. Further, only 15% of German respondents ranked improving citizen satisfaction as the operating

How do you measure up?

Productivity improvements require measuring the results. Earlier *Net Impact* studies demonstrated that the act of measuring is as important as the activities organisations choose to undertake. *Net Impact 2004* revealed similar results – and that 10% of public sector organisations do not track any metrics in their delivery of citizen services. This is almost half the 19% of U.S. corporations that *Net Impact 2003* found were not taking measurements on their customer service. All of the German respondents indicated that they track at least one productivity metric.

The most frequently tracked metrics in Germany are average time to problem resolution (62% vs study average of 33%) and citizen satisfaction (35% vs study average of 44%). Connected Organisations that use the identified best practices for these outcomes could achieve an average 55% improvement in citizen satisfaction and 32% improvement in time to resolution.

The importance of measurement is shown by the fact that organisations that monitor certain metrics achieve greater improvements than those not tracking these metrics. The metrics with the largest difference are:

- Citizen satisfaction – 13% increase
- Average cost per case – 12% decrease

outcome they would most like to improve compared to Europe's 26%.

Previous *Net Impact* studies identified that citizen or end-customer satisfaction is strongly correlated to the efficiency of the organisation. Specifically, the more quickly the organisation can respond and resolve the requests of its citizens, the higher the satisfaction rating. This result was substantiated in the *Net Impact 2004* study, which demonstrated that a 100% increase in efficiency metrics such as average time to case resolution and total cases resolved per time period resulted in an average 37% and 30% increases in customer satisfaction, respectively.

However, it takes more than efficiency to dramatically affect the satisfaction of citizens. *Net Impact 2004* found that focusing on services volume outcomes also has a significant positive impact on citizen satisfaction. The more citizens are able to use public sector services, the higher the citizen satisfaction. In fact, 100% increases in organisational metrics such as number of citizens using services and number of visitors to an online portal created average customer satisfaction increases of 45% and 29% respectively.

In general, the key focus for improving citizen satisfaction is either getting more people to use the services, especially online, or delivering faster turnaround times for requests. Italian and UK organisations fared well again, reporting average citizen satisfaction improvements at the lower end of the best practice range. On the other hand, organisations in Germany and Sweden revealed average gains in the 10% range. Overall, the Connected Organisations implementing the identified best practices for citizen satisfaction reported between a 45-65% improvement in citizen satisfaction over the last 12 months.

More services volume

As noted earlier, German organisations are less concerned about expanding existing services or developing new services than they are about cost. They are also slightly less likely to offer external e-services, even though they are above average at delivering services internally. **This may be at the core of the paradox, since services volume has a direct correlation to both citizen satisfaction and cost savings.**

Net Impact 2004 found that deployment of network applications did not impact service volume improvements as much as for other operating outcomes. Rather, networking technologies, particularly security and Storage Area Network (SAN) technologies, played a significant role in increasing services volumes. SAN, along with the corresponding data mining usage has a slightly lower adoption rate in Germany compared to the European average.

One area where the Germans are leading is extending the reach and accessibility of the network and applications to employees. They have one of the highest concentrations, with over 70% of organisations reporting broad accessibility (60+% of employees) to applications. They also have above average integration with other services, both internal and external. One caution: the best practice of a layered security approach using firewalls, virus scanning and automatic intrusion detection is used by only 28% of German organisations, compared to 45% of European organisations. This may present a risk given their broader network reach.

It is not surprising that 31% of German organisations identified security as their primary network-budget focus for the next 12 months, which is in line with the study average.

Net Impact 2004 measured differences in service volumes through metrics such as the number of citizens using the service, the number of website visitors, and the percentage of relevant services available online. Italian and UK

organisations improved service volumes by over 30%, the highest results in this category. At the low end, German organisations reported service volume improvements of only 11% on average. It is important to remember that these are relative percentage gains, and depend on the size, complexity and starting point of each organizations and country. Connected Organisations that implemented the service volume best practices could expect an estimated 30-50% improvement in their productivity.

21st Century Efficiency- the truth is better than science fiction

Not even Jules Verne could have predicted the results achieved by today's Connected Organisations. While he and other science fiction writers dreamt about robots and androids improving efficiency by doing menial tasks, public sector Connected Organisations are using 21st century business processes, the Web, and new networking technologies to automate tasks, with impressive results.

More than any other outcome, European public sector Connected Organisations desired to improve their operational efficiency, with 80% wanting to accelerate the speed at which the organisation operates. *Net Impact 2004* tracked several efficiency metrics, including average time to case resolution, average number of cases per employee, and average cost per case resolution.

“The ‘electronification’ of services is always accompanied by improvement in business processes, so that further financial benefits are derived from these as well as from the transfer of systems online”

German ICT decision maker

German public sector organisations are below the European average in prioritizing operational efficiency as a key business objective. This might be why their productivity results fall below the average as well. Compared to other countries in the study, German organisations achieved only an average of 15% increase in efficiency, 8% less

than the average for public sector organisations (see Appendix A). Why such a large disparity in efficacy?

Net Impact 2004 found that business process-based practices are the most significant drivers for improvements in efficiency. Not surprisingly, automation of oft-repeated transactions, such as billing and collection, or information and service delivery, yield a significant boost in efficiency. Citizens who can research requirements for a building permit online, apply for it online, and perhaps even pay for it online, consume far less time and resources than those who must queue up at town hall, phone for information, or request forms by mail. Reducing the response time for interactions like permits, tax transactions and import licences is not only the primary objective, it also has a direct impact on citizen satisfaction.

As such, higher priority on meeting and delivering citizen services would increase the effectiveness of German public sector organisations. It seems again, an unbalanced emphasis on cost reduction at the expense of other

objectives such as citizen services leads to reduced effectiveness.

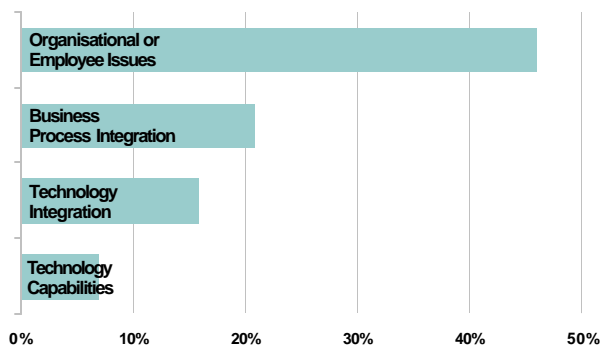
A best practice that shares a remarkable correlation to efficiency outcomes is the deployment of data mining and analysis tools. German public sector organisations collect vast amounts of data; however, such data can become overwhelming without broad use of data mining and analysis tools. The *Net Impact 2004* study revealed that the more widespread the use of data mining tools in an organisation, the more efficient and effective the organisation becomes.

Not surprisingly, this data mining is closely linked to the networking best-practice of Storage Area Networks (SANs). The sheer volume of data stored by public sector organisations means the higher average speed, network efficiency and availability that SANs offer, the better the support to employees and citizens who need access to this information. Overall, *Net Impact 2004* found that Connected Organisations implementing the best practices for efficiency realised between a 35-55% improvement in efficiency. More specifically, this could mean reducing building permit approvals from 60 to 35 days.

People, Process and Technology

It is not surprising that successful eGovernment projects require a combination of applications and business processes distributed by a sophisticated network. Many studies, including previous iterations of *Net Impact*, have identified the importance of these actions. However, the timing of these activities is critical to realise the full productivity potential of Connected Organisations.

Net Impact 2004 found that process re-engineering to leverage new technology capabilities was a significant contributor to improvements in efficiency and cost reduction. When sequenced appropriately, processes and technology have an even greater impact – organisations that, in addition to other best practices, applied process re-engineering before the deployment of applications realised cost savings of 20-30% over 12 months. Those that re-engineered after application deployment were likely to achieve less than half of that result. That slight difference in timing imposes as much as a 50% penalty on the improvement in operational costs. This is quite clear



Source: Momentum Research Group—*Net Impact 2004*

Figure 2: Barriers to Future Productivity Growth

when considering some examples, such as moving car registration from stand-alone offices to car dealerships, or using automated mobile-phone text-messages to parents to indicate a school absence.

Organisations that spend millions implementing and integrating complex ICT projects should not forget the corresponding investments in people. Organisational and employee issues present by far the biggest perceived barrier to future productivity growth. Over 35% of respondents identified these factors as potentially the most limiting factor for future productivity gains:

- Internal resistance to changing processes;
- Inability to absorb new technologies;
- Lack of worker training;
- Inability to change staff behaviour;
- Lack of support from leadership;
- Culture of centralised decision-making.

In contrast, only 15% of respondents identified lack of budget as the single largest obstacle to future productivity improvements.

The story in Germany was slightly different. While most of the issues received comparable responses, lack of support from leadership was a standout, well above all other countries. On the technical side, Germany also recorded the highest mention of lack of systems integration with other areas and lack of accurate citizen services data. This could be due to the decentralized nature of Germany, with most services being implemented by the *Länder* or at the local level, as opposed to nationally.

Best Practices for Optimal Productivity

Net Impact 2004 identified three best practices that successful Connected Organisations implemented to help counteract the above obstacles. These two cultural behaviours and one network application had a positive effect on all productivity outcomes:

1. Communicate regularly the strategic plan for services delivery. It is easy to see how clear and consistent communication of objectives throughout the organisation would help lower resistance to process and behavioural change and clarify leadership support. This virtually no-cost best practice is already being implemented by 40% of German Organisations.
2. Maintain focus on providing e-services to citizens or end-customers. This does not imply that internal or back-office functions should take a back seat. In fact, many eGovernment projects require a certain amount of internal process change and automation before the external aspects can be implemented. However, maintaining a focus on citizens appears to be as important for public sector organisations as a strong customer focus is for corporations. The vast majority

(90%) of German organisations are supporting internal e-services, but only 53% currently have external initiatives targeted to citizens or end users.

3. Deploy web-enabled workforce collaboration and training applications. Web-enabled training applications are extremely time-efficient, since employees can take courses specifically suited to their needs and schedule. The convenience and flexibility of such applications improve training completion rates. Improving access to web-enabled collaboration tools such as collaborative workspaces and instant messaging will allow workers to quickly deal with exception cases, an increasing percentage of daily tasks due to process automation. Only 58% of Connected European Organisations have made their workforce collaboration and training tools available to their workforce through a web-based technology .

Key Findings

The primary rationale of *Net Impact 2004* was to understand the inter-relationships between people, process and technology and the resulting productivity gains. Do Connected Organisations have higher productivity resulting from their greater investment in sophisticated network infrastructures, Internet business applications and process re-engineering?

Net Impact 2004 uncovered Several common themes. In general terms, Connected Organisations that have increased their productivity the most are:

1. Investing in network sophistication beyond the minimum necessary to implement their applications.
2. Re-engineering business processes for efficiency and effectiveness, prior to application deployment.
3. Automating individual business processes with Internet applications and integrating them with other service functions.

While each of these can increase productivity on their own, *Net Impact 2004* found that internal culture plays an important role, and organisations realised greater improvements from the above activities by:

4. Orienting the organisational culture towards process improvement and service delivery.

The final step in realising increased organisational productivity from technology is by measuring the performance of these efforts:

5. Deploying formal measurement systems to track operational performance.

While this formula of network + application + process + culture seems rather simple, the actual implementation has as many flavours and variations as does the typical beer recipe (barley + hops + water + yeast). As with beer, simply combining ingredients does not guarantee a positive outcome. The sequence and timing of the ingredient mix is essential.



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Appendix A : Net Impact 2004 Metrics and Best Practices

Best Practices:

Efficiency: 35-55% Improvement

Applications

- Finance and Accounting application installed;
- Web interface: Workforce Training and Collaboration tools;
- Application data is integrated with data from international databases;
- Greater numbers of processes accessed through a Web-based interface.

Networking Technologies:

- Deployment of Storage Area Network (SAN);
- Deployment of a network-user authentication system such as Public Key Infrastructure (PKI);
- Network uses QoS policies/tools to prioritize throughput ;
- Network will support any applications that may be deployed in the next 12 months.

Business Process:

- Functionality: Data mining and analysis;
- Automation of: Billing and Collection; Information and Service Delivery; Case Mgmt processes;
- Integration of: Case Mgmt processes.

Organisational Culture and Behavior:

- Strategic plan for developing and delivering services is regularly communicated throughout the organisation;
- Reengineering of business processes (regardless of timing) to leverage new technology capabilities.

Services: 30-50% Improvement

Applications

- Web interface: Workforce Training and Collaboration tools;
- Greater number of data sources (both inside and outside the organisation) integrated with deployed enterprise applications.

Networking Technologies:

- Deployment of real-time intrusion detection technology ;
- Having a layered security system designed to monitor traffic and detect intrusion;
- Use of Storage Area Network (SAN).

Business Process:

- Functionality: e-Learning; support of Regulatory Compliance;
- Automation of: Information Service and Delivery;
- Integration of: Information Service and Delivery processes.

Organisational Culture and Behavior:

- Focus on providing e-services directly to citizens, end-customer;
- Organisation works to consistently align applications, network and business processes;
- Reengineering of business processes (regardless of timing) to leverage new technology capabilities.

Financial: 20-30% Improvement

Applications:

- Web interface: Workforce Training and Collaboration tools; Resource Allocation and Mgmt.

Networking Technologies:

- Network uses load balancing, content distribution and caching to optimize network applications
- Network will support any applications that may be deployed in the next 12 months;
- Network is accessible by remote employees or staff.

Business Process:

- Functionality: Integrated records systems

Organisational Culture and Behavior:

- Reengineering of business processes (regardless of timing) to leverage new technology capabilities;
- Data standards are uniform throughout the organisation.

Satisfaction: 45-65% Improvement

Applications:

- None identified.

Networking Technologies:

- None identified.

Business Process:

- Functionality: Data Mining and Analysis;
- Automation of: Information and Service Delivery; Workforce Collaboration and Training; Problem Diagnosis and Resolution processes.

Organisational Culture and Behaviour:

- Organisation's strategic plan for developing and delivering services is regularly communicated throughout the organisation;
- Reengineering of business processes (regardless of timing) to leverage new technology capabilities;
- IT department works closely with organisational leaders to ensure technology fulfills organisational needs.

Metrics

Efficiency:

- Citizen satisfaction;
- Average time to resolution;
- Average cases resolved per employee;
- Total cases resolved per day / week / month;
- Average cost per case resolution.

Services:

- Number of citizens using the service;
- Number of website visitors;
- Number of cases filed online;
- Percent of relevant services available online.

Financial:

- Operating costs (specific to citizen service and support)
- Percent of cases resolved through self-service.
- Annual fees or revenue collected (tracked separately).

More Information

Complete *Net Impact 2004*, *Net Impact 2003*, and *Net Impact 2002* results are available at www.netimpactstudy.com