



2nd Annual Internet MLS Customer Satisfaction Survey
February 2003
By Gregg Larson

In January of 2003, Clareity Consulting of Scottsdale, Arizona completed a survey of America's leading Multiple Listing Services. This survey was designed as a follow up to Clareity's first Internet MLS Customer Satisfaction survey. The purpose of the study was to learn more about Internet MLS (iMLS) adoption, customer satisfaction, system performance, and vendor responsiveness. This year 89 MLSs with Internet based systems responded - 78 were operating standalone and 11 systems were running in parallel to a legacy MLS system. The MLSs were located coast-to-coast, ranging in size up to 34,000 subscribers.

The following MLS software vendors were included in this survey – the number of standalone MLS responses received for each MLS provider is in parentheses:

- FBS (9)
- FNIS (9)
- Interealty (9)
- MarketLinx (13)
- Offutt Systems (10)
- Rapattoni (8)
- Solid Earth (13)
- Stratus (2)

The following MLS software providers were not included in this report because Clareity received less than two responses: Advanced Marketing Services, ARIS, Coherent, Dwellinks, Hillside Software, ProMatch, Quest Technologies, RealGo and Wyldfyre.

Clareity also received responses from three *MLS owned and operated systems*. In 2001 and 2002, several regional MLSs took over full ownership and software development responsibility for their web-based MLS software.

When looking at the results of this study, it is important to realize that there are different types of MLS software vendors being compared. Specifically, FNIS, Interealty, MarketLinx, Rapattoni and Stratus are vendors with a history of serving larger MLS markets, while Offutt Systems, FBS, and Solid Earth have typically focused on small to mid-size markets. The distinction is that Clareity could easily have split the statistical tables below in two – 'Vendors Proven in All Markets' and 'Vendors Proven in Small/Medium Markets'. This is an important distinction, because some vendors that may appear to have only middling ratings are actually at the top of their market segment.

Please Note: ‘Vendors Proven in Large Markets’ are displayed in blue in the following tables, while ‘Vendors Proven in Small/Medium Markets’ are displayed in purple.

A. Customer Satisfaction

The following chart represents *overall satisfaction today*:

	Excellent %	Good %	Acceptable %	Poor %
MLS owned and operated	100	0	0	0
Stratus	100	0	0	0
FBS	89	11	0	0
Solid Earth	77	23	0	0
Rapattoni	63	38	0	0
MarketLinx	46	46	8	0
Interealty	44	56	0	0
Offutt Systems	33	67	0	0
FNIS	33	33	33	0

Almost all MLS vendors were rated ‘Excellent’ or ‘Good’ for *overall satisfaction today*. The MLS owned and operated systems should be expected to do well, since they have only one customer to serve - themselves. It should also be noted that Stratus only had responses from two very large MLS customers, but they apparently serve them very well. A single customer rated satisfaction with MarketLinx only ‘Acceptable’, and three customers rated FNIS ‘Acceptable’.

The following chart represents MLS *staff satisfaction* with the systems:

	Excellent %	Good %	Acceptable %	Poor %
FBS	100	0	0	0
Stratus	100	0	0	0
MLS owned and operated	100	0	0	0
Rapattoni	88	13	0	0
Solid Earth	69	31	0	0
Interealty	56	44	0	0
Offutt Systems	44	44	11	0
MarketLinx	31	31	31	8
FNIS	22	44	22	11

In this chart we see some movement within the top and bottom of the field from the overall satisfaction ratings – but the systems that satisfied the users were given the best ratings by the MLS staff too. There are other aspects of the system that affect this rating, and those will be come out in the sections below.

Survey respondents were asked whether they would *choose the same MLS vendor* again. All indicated, “Yes”, but the following:

	No
MarketLinx	1 out of 13
FNIS	2 out of 9

33% percent of all FNIS respondents also indicated that they would not choose the same FNIS *system* again.

The following chart represents *overall satisfaction in the first 30 days*:

	Excellent %	Good %	Acceptable %	Poor %
Stratus	100	0	0	0
Solid Earth	38	46	8	8
MLS owned and operated	33	33	33	0
FBS	33	33	22	11
Rapattoni	25	38	25	13
MarketLinx	23	31	31	15
Interealty	11	44	44	0
Offutt Systems	11	56	22	11
FNIS	11	33	11	44

Conversions are rarely fun, but some vendors did better than others with Stratus and Solid Earth having the greatest satisfaction in the first thirty days. The section below helps explain these initial satisfaction ratings.

B. Implementation Planning, Data Conversion, and Ability to Hit Deadlines

Satisfaction with implementations can often be traced to the ability to deliver on promises made during the initial sales presentations. Clareity asked the MLSs to rate the vendors on *“Truthfulness in representing their software and capabilities during the initial sales presentations; compared to what was delivered”* The following chart shows the response:

	Excellent %	Good %	Acceptable %	Poor %
FBS	100	0	0	0
Stratus	100	0	0	0
Rapattoni	88	13	0	0
Solid Earth	62	38	0	0
MarketLinx	46	38	15	0
Interealty	44	56	0	0
Offutt Systems	22	67	0	11
FNIS	11	56	22	11
MLS owned and operated	0	50	50	0

Stratus and FBS clearly set expectations properly and delivered what the customer was expecting.

Survey respondents were also asked to rate each vendor on their *implementation planning*. The results were as follows:

	Excellent %	Good %	Acceptable %	Poor %
Stratus	100	0	0	0
FBS	89	11	0	0
Solid Earth	69	15	15	0
Rapattoni	63	38	0	0
Interealty	33	67	0	0
Marketlinx	33	25	25	17
Offutt Systems	33	33	22	11
MLS owned and operated	33	33	33	0
FNIS	22	33	33	11

In 2001, MarketLinx was the clear winner in this category, but in 2002, they slipped in customer satisfaction with their implementation planning.

Clareity also asked respondents to rate the *“Vendor’s ability to hit deadlines and deliver the system on time”*. The four highest rated MLS vendors were:

	Excellent %	Good %	Acceptable %	Poor %
Stratus	100	0	0	0
FBS	89	11	0	0
Interealty	89	11	0	0
Rapattoni	88	13	0	0

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Since data conversion is an important part of implementation, Clareity had the survey respondents rate the MLS vendors on *data conversion accuracy*. The following were the results:

	Excellent %	Good %	Acceptable %	Poor %
Stratus	100	0	0	0
MLS owned and operated	100	0	0	0
Rapattoni	63	25	13	0
FBS	56	44	0	0
Solid Earth	54	31	15	0
MarketLinx	46	38	15	0
Interealty	44	56	0	0
Offutt Systems	44	56	0	0
FNIS	33	56	0	11

Rapattoni, Solid Earth and MarketLinx were each given an 'Acceptable' rating by one customer, while FNIS received a single 'Poor' rating.

C. System Features, Performance and Reliability

Both Stratus customers gave Stratus 'Excellent' *user interface* ratings, while the rest of the field was largely split between 'Good' and 'Excellent'.

	Excellent %	Good %	Acceptable %	Poor %
Stratus	100	0	0	0
FBS	56	44	0	0
Solid Earth	54	46	0	0
Rapattoni	50	50	0	0
MarketLinx	46	46	8	0
Offutt Systems	44	56	0	0
FNIS	44	33	22	0
Interealty	33	67	0	0
MLS owned and operated	33	67	0	0

Most of the systems were well rated for *response times during peak periods*, with MarketLinx and Interealty having a single 'Acceptable' rating apiece. FNIS earned the only 'Poor' rating from one customer.

	Excellent %	Good %	Acceptable %	Poor %
Stratus	100	0	0	0
MLS owned and operated	100	0	0	0
Solid Earth	75	25	0	0
FBS	67	33	0	0
Offutt Systems	56	44	0	0
Rapattoni	50	50	0	0
MarketLinx	46	38	15*	0
Interealty	33	44	22*	0
FNIS	33	56	0	11*

* All systems with less than 'Good' ratings were hosted by the vendor.

As expected, Stratus was rated 100% excellent in their reliability and system up-time – but so were Rapattoni and the MLS Owned and Operated systems. Rapattoni's recent data center investment appears to be returning dividends. No vendor was rated poorly.

	Excellent %	Good %	Acceptable %	Poor %
Rapattoni	100	0	0	0
Stratus	100	0	0	0
MLS owned and operated	100	0	0	0
Solid Earth	85	15	0	0
FBS	78	22	0	0
Interealty	67	33	0	0
Offutt Systems	67	33	0	0
FNIS	66	33	0	0
MarketLinx	62	23	15	0

The top rated vendors for overall *feature depth* were:

1. Stratus
2. FBS
3. Solid Earth

The top rated vendors for *public records* were:

1. Interealty
2. Stratus
3. Solid Earth

The top rated vendors for *mapping* were:

1. Solid Earth
2. Stratus
3. MarketLinx

The top rated vendors for *reports* were:

1. Solid Earth
2. Rapattoni
3. Stratus

The top rated vendors for *IDX implementation* were:

1. Stratus
2. Rapattoni
3. FBS and MLS Owned and Operated (tied for third)

Clareity asked, “Who keeps pace with evolving technology (e.g. *IDX; RETS; VOW; Mobile Devices / WAP / PDA interface*)?” The ratings were as follows, with Rapattoni, Stratus, and FBS leading the vendors. Only FNIS received less than a ‘Good’ rating.

	Excellent %	Good %	Acceptable %	Poor %
Rapattoni	100	0	0	0
Stratus	100	0	0	0
FBS	89	11	0	0
Interealty	67	33	0	0
MLS owned and operated	67	33	0	0
Solid Earth	62	38	0	0
Offutt Systems	56	44	0	0
MarketLinx	54	46	0	0
FNIS	11	22	56	11

MarketLinx has been an industry leader in RETS development and recently implemented advanced GIS mapping, so Clareity was slightly surprised at this rating.

D. Vendor Responsiveness and Customer Service

When it comes to change, some vendors are better than others in fulfilling *change requests*. The following chart shows how the vendors rated:

	Excellent %	Good %	Acceptable %	Poor %
Stratus	100	0	0	0
FBS	100	0	0	0
Interealty	78	22	0	0
Rapattoni	75	25	0	0
MLS owned and operated	67	33	0	0
Solid Earth	54	38	8	0
Offutt Systems	33	56	11	0
FNIS	0	67	22	11
MarketLinx	8	62	8	23

The respondents rated *end user support*:

	Excellent %	Good %	Acceptable %	Poor %
FBS	100	0	0	0
Stratus	100	0	0	0
MLS owned and operated	100	0	0	0
Solid Earth	67	25	8	0
Interealty	56	44	0	0
MarketLinx	50	30	20	0
Offutt Systems	50	50	0	0
Rapattoni	50	38	13	0
FNIS	11	44	33	11

They also rated *staff support*:

	Excellent %	Good %	Acceptable %	Poor %
FBS	100	0	0	0
Interealty	78	22	0	0
Rapattoni	63	38	0	0
Solid Earth	62	38	0	0
Offutt Systems	56	33	11	0
Stratus	50	50	0	0
FNIS	44	33	11	11
MarketLinx	31	38	31	0

Clareity felt the question regarding staff support did not apply to 'MLS owned and operated' systems.

E. Recommendations from MLS Leaders

Respondents were asked to share the top three things they would do differently in the system/vendor selection; contract negotiations; conversion planning; user training; or member communications for their Internet MLS system. Clarity received dozens of excellent recommendations. Here were some of the best:

1. Make sure you're comparing apples to apples in terms of program features, and pay attention to the more technical aspects of the system (what kind of equipment do they use, are there backups and redundancy, etc.)
2. Spend more time evaluating systems.
3. Insist on more testing time before conversion.
4. Run parallel until all end users have comprehensive hands on training by vendor staff.
5. Don't run parallel for too long. It only prolongs the agony and members don't learn the new system as long as the old one is available.
6. Wait a little longer next time to sign up for new technology.
7. Communicate with your members as much as possible about the change. Do it to the point of overkill.
8. Have a better transition plan.
9. Require financial statements and a performance bond from the vendor. Require that in the event of sale, it be a condition of the transfer of contract to the new vendor that the product be continued to be supported and not dumped.
10. Have written performance standards and penalties for vendor. Define events of Material Breach more specifically. Include a "Walk Away" provision.
11. To the extent possible, make sure the vendor has not scheduled a cutover for another customer either shortly before yours or immediately after yours. That way you will get much more attention for a longer period of time.
12. Provide, in the contract, exact dates after cut-over for vendor to correct errors and shortcomings that are inherent in any new system
13. I would not have reassigned some of our areas at the same time as the cutover.
14. Make sure vendor does comparison of how data will transfer in all modules from old to new in advance of conversion
15. Hire another staff person to help manage the transition.
16. Would conduct more browser and IE basics training at cutover.

F. Conclusion

A year ago, the group of “new” MLS companies, led by MarketLinx, Stratus, and Rapattoni, outscored the established MLS vendors at iMLS implementation, end-user satisfaction, and vendor responsiveness. Since that time, Stratus and Rapattoni have maintained relatively high consistent service levels. MarketLinx experienced rapid growth over the past 12 months by taking away several key accounts from FNIS and Interealty. This survey revealed what may be the inevitable results of that success – MarketLinx is still doing very well, but slipped in its customer satisfaction ratings in a few areas.

Last year, we saw Interealty and FNIS both dump their first generation iMLS systems to offer new, redesigned systems. Interealty improved dramatically in several key areas in 2002 including vendor responsiveness, but FNIS still has room for improvement. Just prior to the publication of this report, FNIS made a management change that placed industry veteran and former Clarity partner Ira Luntz in charge of MLS system development. Clarity wishes Ira and the new FNIS management team well in their endeavors to roll out Paragon 2.0, re-releases XMLS, and improve customer satisfaction.

This year, we observed that FBS and Solid Earth have gained a loyal following by providing excellent service. While these vendors have historically served mostly small and mid-sized MLSs, the new survey results indicate that FBS and Solid Earth may appeal to larger MLSs, especially those seeking a higher level of service.

Clarity thanks the MLS executives that participated in the 2nd Annual Internet MLS Customer Satisfaction Survey and the MLS vendors that provided customer lists for this survey. Clarity believes that this annual survey helps move the industry forward, recognizing the MLS vendors that have done a great job for their customers and motivating other companies to improve customer satisfaction.

Thank you!