

Richard Ivey School of Business
The University of Western Ontario

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AGILENT TECHNOLOGIES

Camilla Burg, Anamika Ghosh and Maria del Carmen Arenas prepared this case under the supervision of Jeff Saperstein solely to provide material for class discussion. The authors do not intend to illustrate either effective or ineffective handling of a managerial situation. The authors may have disguised certain names and other identifying information to protect confidentiality.

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INTRODUCTION

In the late 1990s, the test and measurement, semiconductor products, health-care solutions and chemical analysis businesses of Hewlett-Packard (HP) underwent a remarkable transformation. They were reborn as Agilent Technologies. The rebirth allowed the organization to reinvent itself while retaining many of the strengths of its parent. Its culture, its communication practices, its organizational structure and its business principles were all transformed to align with the new company.

In January 2003, Shirley Horn, Agilent's senior director of global brand management was grappling with two key questions:

- What were the options available to Agilent for retaining, building and measuring value and trust given the evolving nature of technology, continuing economic downturn, budget constraints and customer loyalty to the former HP brand?
- To what extent were customers' perceptions of trust and value being affected by their new technology-driven approach?

BACKGROUND

Agilent's roots began in 1939 when two entrepreneurs, Bill Hewlett and Dave Packard, started their company, Hewlett-Packard, to provide test and measurement equipment. By 1998, the test and measurement business had grown to constitute nearly 20 per cent of HP's total revenue of \$47 billion. During that period, HP had also diversified into printers, imaging equipment, computers and servers. The high technology and rapidly evolving nature of the test and measurement divisions differentiated them from the printer or computer business. This different focus and business models prompted HP to split into two separate, independent companies. The consumer/computer business retained the HP name, and the original company, now called Agilent Technologies, comprised HP's test and measurement, semiconductor products, health-care solutions and chemical analysis businesses, related portions of HP's Laboratories, and associated infrastructure.

As an \$8 billion startup with a 60-year history, Agilent began with a unique heritage of HP, which included a rich technology portfolio, robust financial strength, leading market position and an entrepreneurial culture.

Today, headquartered at Palo Alto, California, Agilent competes in and is a market leader in the high-tech business-to-business sector. Agilent operates in 40 countries and serves customers in more than 120 countries. The company derives 60 per cent of its revenues from overseas markets. Its businesses provided new technologies, solutions and services to customers in the communications, electronics, life sciences, and chemical analysis industries. Agilent's customers included Fortune 500 companies such as Cisco, Dow Chemical, Glaxo, Intel and Merck.

To meet the needs of its diversified customers, Agilent divided its business into four groups (see Exhibit 1).

These businesses applied measurement technologies (except SPG) to develop products that sense, analyse, display and communicate data. SPG supplies advanced semiconductor component solutions to the fibre-optics networking and wireless communications equipment markets, and application-specific integrated circuits to the printer, computing and networking industries. Agilent's Research Laboratories supported all these business groups. The mission of the labs was to partner with each business group to enable it to meet the changing needs of customers and to create new opportunities.

The Test and Measurement Group

Since Agilent's inception, the Test and Measurement group has been the largest revenue generator and, therefore, the most important business for the company.

This group contributed 55 per cent of net revenue of Agilent in 2002. It includes two segments:

1. Electronic Products and Solutions Group (EPSG), which provides a wide range of test and measurement instruments, solutions, systems and services to the electronics and wireless communications industries
2. Communications Solutions Group (CSG), which focuses on the communication industry, providing test and operation support system (OSS) solutions for wireline, wireless and Internet Protocol (IP) service providers to help reduce capital and operating expenses and to increase revenues.

Agilent was either No. 1 or No. 2 in every major segment of the test and measurement market in which it competed. Its market share varied by segment, but could range from 35 per cent to 70 per cent of the market. The average purchase cycle of instruments was approximately every three to five years. Products purchased for their superior performance are, however, bought more frequently depending on project design cycle needs. The average value of purchase ranged from approximately \$3,500 to over \$50,000.

Some of the Test and Measurement group's customers included major brand names such as AT&T, Boeing, Hitachi, General Electric, Lucent and SBC. Competitors include names such as Anritsu, Tektronix, Advantest, Fluke Corporation, National Instruments and Rhode Schwartz. The group's products were designed to meet the needs of the communications and electronics industries. While growth had moderated in these markets, companies were still looking for products that could reduce the time it took to design and develop new products, reduce manufacturing costs for products and reduce capital and operating costs.

Overall, Agilent aimed to rely on new products to drive orders growth in 2003-04 and to gain share in larger existing markets. In fact, in 2002, the proportion of revenue from new products increased by approximately 20 percentage points over that of 2001. Test and Measurement introduced more than 100 new products, nearly a quarter of which had significant strategic and financial impact on Agilent.

The strategy for growth of this group was fivefold:

1. To identify customers' business and technology needs, then leverage across the value chain,
2. To introduce emerging test technologies to accelerate customer progress,
3. To satisfy customers through operational excellence,
4. To focus on leading-edge customers,
5. To build new capability in solutions, systems and services.

Overview of the Electronic Products and Solutions Group (EPSG)

EPSG was founded under the HP brand and is therefore one of Agilent's 'heritage businesses.' EPSG is the largest part of the company in terms of revenue (represents about 50 per cent of Agilent's business), number of employees and number of product lines. The group is a global market leader in several product categories (see Exhibit 2).

In addition to these, EPSG is No. 2 in the global market for digitizing oscilloscopes, digital voltmeter/multimeter and DC electronic load product categories.

EPSG's customer base can be divided into four distinct customer segments based on the application that they purchase:

- wireless
- RF microwave
- general purpose
- digital design

Since the individual customers can not be counted, the data is report by "sites." There are about 10 to 15 individual customer names per site. Customers in more than one application are represented by the overlapped portions as seen Exhibit 3.

The distinct segmentation of EPSG's customer base highlights the diversity of product categories that it serves. The larger customers are placed in a tier for special post-sales support. According to Exhibit 4, digital design and general purpose, which represent 40 per cent of customer segment by application, contribute to 90 per cent of EPSG's revenues.

During the 1990s, before the split from HP, robust economic growth permitted EPSG's products to be sold at a premium. However, in the current market situation EPSG's products are competitively priced as compared with the nearest competitor. Agilent is keen to maintain competitive prices especially for low-cost products where price is extremely critical.

EPSG's goal is to be price competitive in all product categories. However, given the diversity of these categories, the group does not have a single pricing strategy. Each product line conducts its own internal analysis of the competition and ultimately decides its pricing strategy.

BUILDING CUSTOMER LOYALTY IN A CHANGING ENVIRONMENT

Building Customer Loyalty in a Changing Environment

During the economic boom of the 1990s, many companies were financially capable of investing heavily in communication and marketing activities. However, the downturn that began in 2000 led to substantial cutbacks in these expenses. In the interim, the emergence and convenience of new technology, for instance the Internet, significantly affected the way service, marketing and communication activities were being delivered. Marketing activities such as customer service no longer consisted primarily of face-to-face meetings or telephone conversations with a sales or customer representative. These activities extended to e-mail and online self-service and customized service models using the latest technology. Further, company Web sites became an advertising tool to showcase products, services and global competencies.

Agilent Technologies was at the forefront in implementing such models. The organization's decision to take a more technology-driven approach was not only the result of tighter competitive and economic environments, but also due to significant breakthroughs in technology. These changes were simultaneously accompanied by the implementation of in-depth tracking studies that looked at customers' perceptions of the brand such as *Value* and *Trust*, to ensure that customers remained highly satisfied with Agilent Technologies' service.

The Impact of Economic Slowdown

The tech sector, particularly the telecommunications industry, was extremely hard-hit during the 2000-2003 economic downturn. Excite@Home, Tricord Systems, American Metrocomm, CHS Electronics, Unicapital Corp., Global Crossing, Adelpia Communications Corp., Covad Communications, Yipes Communications, and AT&T Latin America Corp. are examples of bankrupt telecommunication companies. As a highly diversified company, Agilent was not affected quite as badly as some technology companies whose primary focus was telecommunications. However, a review of Agilent's financial statements during this period points to the fact that Agilent also suffered greatly from the downturn in the economy.

Most of Agilent's customers were under intense pressure to reduce their operating costs, since they were being affected by the same economic downturn that Agilent was enduring. Additionally, as a capital equipment provider, Agilent's revenues were being driven by the capital expenditure budgets and spending patterns of its customers, who were delaying purchases in reaction to changes in their businesses and in the economy. As a result, the changes in the perception of 'value for money' during the tough market climate contrasted dramatically with previous

periods of strong economic growth when customers considered their long-term needs and weighed the benefits of buying top-of-the-line models.

However, despite the effects of the downturn, Agilent's customers still wanted to know that the company was going to be around as a supplier for the long term and could be trusted to provide an after-sale partnership. Any changes to advertising budgets were also likely to have an impact, albeit in a much more subtle way, on customers' perceptions of long-term viability.

An insight into the role of advertising was illustrated by a quote from a 20-year veteran from Intel in his recent book (*Marketing High Technology, An Insider's View*, The Free Press, 1986):

. . . when customers make such purchase decisions, the intangible factors become very important. Customers evaluate suppliers on how well they perform and how much they can be trusted. Will they really fix any problems? Will the service be reliable? Will they be in business five years from now? . . . Advertising can help create trust, but it represents only a small part of the selling process; reputation, service, support and references are more important. This is what makes high tech marketing different from consumer marketing.

Davidow, 1986, p33-35

With regard to changes in staffing and customer service models and the impact on trust, Horn was less worried, since she felt that Agilent's honest approach with customers regarding changes and why those changes were being made meant that Agilent would not compromise the trust it had built up over such a long time. Horn was, however, concerned about the impact of the split and loyalty to the HP brand on the perception of trust and value.

The Impact of the Split on Trust and Value

After the split, brand tracking studies revealed that Agilent's customers had a fierce loyalty to the HP brand. In fact, a study conducted as recently as August 2002 showed that the HP brand led Agilent in top-of-mind awareness, most noticeably among its EPSG and ATG customers (see Exhibit 5).

The primary conjecture for the higher awareness numbers for the HP brand was that these customers had spent many years building trust with the HP name and what it stood for. This was particularly true for Agilent's "heritage HP businesses," ESPG and ATG. These business divisions catered to long-time customers used to high levels of personal service that were affordable and commonplace up until the late 1990s under the HP brand.

However, the data did not clarify the extent of the impact of loyalty to the HP brand on the loyalty for the Agilent brand. What did customers mean when they said 'HP'? And indeed, during in-depth studies, many customers acknowledged that they really meant 'Agilent' when they said 'HP,' indicating a powerful and intangible loyalty to the comfort of the old HP brand name.

Table 1

LOYALTY TO THE HP BRAND

	Respondents
	N
Mentioned HP	257
But Really Meant Agilent	116
% who mentioned HP but meant Agilent	45%

Overall, it was difficult for Agilent to ascertain and measure what the exact impact the brand name change had on their customers. In the three years after Agilent split from HP, there were a number of phenomena that were difficult to isolate that could have an effect on perceptions of trust and value.

The first was the impact of the 1999 split from HP. Research conducted by Agilent at that time showed that customers would take a "wait and see" approach to how well it would perform as an independent organization. In essence, they held their votes of trust and value until they could test how well Agilent would deliver on its promises.

The second factor was the impact of the tech boom and bust. Agilent found that it was difficult to pin down exact definitions of what their customers meant by value and understand the behavior that earned the trust of their customers. This was because their tracking studies took place over periods of boom and bust. Agilent believed that customers' perceptions regarding what these attributes meant when their brand tracking surveys were administered were entirely different under the diverse economic environments in which the studies were conducted.

Third, regardless of the tech boom and bust, Agilent had had to re-evaluate how it ran its business as it had a different infrastructure and access to different resources as a \$6 billion to \$8 billion company compared to those as part of a \$40 billion-plus company. It was difficult for Agilent to maintain or improve the value it offered to customers while continuing to earn their trust during this period of necessary changes.

Fourth, the "hockey stick" growth in the pervasiveness and acceptance of the Internet as a major information and communications resource had an effect. By the end of the 1990s, the Internet had "crossed the chasm" into mainstream acceptance and use as a communications and information tool. Suppliers had finally populated

their Web sites with all the vital information customers required, and customers were more and more comfortable with going to the Web for information. During this time, companies were also trying to reduce the cost of sales by making their sales teams more efficient and redirecting their face-to-face sales and service teams to revenue-generating activities, rather than information dissemination.

As a result of these large numbers of constantly altering factors, Agilent has found it difficult to compare perceptions of value and trust under the HP brand with that under the Agilent brand. The entire customer service model had been turned on its head due to so many technical and economic changes.

The Importance of Trust and Value to Agilent

Trust and *value* were two key attributes that Agilent was using for tracking customer satisfaction and loyalty across its customer base. These attributes were important for the company as it believed they contributed to brand loyalty. In addition, Agilent felt that reliability, reputation and price also featured significantly in forming customer perceptions. Agilent believed that, by building trust, they were better able to generate barriers for new entrants and increase their ability to respond to competitive threats, generate additional revenue and make customers less susceptible to move to competitors.

Their assumptions are supported by studies that found that customers base their purchasing decisions on perceived value, rather than on levels of satisfaction, and tend to assess suppliers by comparing them with alternatives. As a result, the greater the value added by the supplier and its brand name, the better the chances that preference for that brand will survive the lower prices and promotions of competing products and services.

Agilent believed that customers' perceptions of attributes were also driven by the knowledge base the company was offering. Agilent's knowledge base offered them a competitive edge by delivering expertise, ability and credibility to all touch points with customers. The knowledge related to the ability of Agilent's sales and customer service personnel to understand its customers' needs and provide them with advanced technical solutions to meet those specific needs. Knowledge also related to the ability to provide information, education, service and solutions about the latest technology to their customers. Agilent has been building, influencing and strengthening these attributes on an ongoing basis using marketing tools such as advertisements, articles, technical seminars and customer service. These activities helped shape Agilent customers' attitudes and perceptions toward the brand.

Tracking and Measuring Trust and Value

Agilent has been tracking perceptual attributes through its marketing research to give the company a better understanding of how to continue to build customer loyalty in their complex, ever-changing and highly competitive product categories. A part of a brand tracking questionnaire is attached in Exhibit 6.

Agilent runs ongoing semi-annual awareness and preference studies in which EPSG participates. These studies are conducted among all customers and include involvement by Agilent's very senior management. Questions included in these studies cover products, price, quality, service, documentation, delivery and so on. Some of the attributes that are tracked are reputation, reliability, leadership and commitment to customers. Exhibit 7 presents the image ratings for Agilent from the August 2002 tracking survey. Ratings were on a zero to 10 scale with 10 being the highest. At present, all these attributes are weighted equally by the company. However, weighting the importance of each of these attributes as they relate to Agilent's business might show some important trends in customers' ratings. Also, while these studies do not specifically measure trust or the perception of value, Agilent believes they provide acceptable indicators for the attributes of trust and value.

Agilent also conducted other focused studies among a smaller segment of its customers. For individual communication programs such as e-mail updates, there are unique customer satisfaction surveys conducted to find out what customers think of this service (see Exhibit 8). Its e-Business team also conducts regular Agilent customer satisfaction (ACS) surveys to monitor the progress they are making with their Internet-based services.

In March 2003, the ACS survey involved 28 per cent frequent, 61 per cent infrequent and 11 per cent first time visitors to the Agilent/EPSC Web site. The findings of the survey are provided in Exhibit 9.

Exhibit 9 shows the rising trend towards high satisfaction derived from the Agilent/EPSC Web site. More than half the visitors in March 2003 rated the Web site between 8 and 10. Between January 2002 and March 2003, the percentage of customers choosing this high rating category increased by almost 25 per cent. Agilent's future efforts to raise satisfaction can be targeted towards those customers who rated between 5 and 7. In fact, nearly a third of the respondents suggested that overall satisfaction could be further raised by increasing the relevance and depth of contents at the Web site.

Perceptions of Trust and Value

Within EPSG

The history of EPSG (i.e., its HP heritage) significantly affected the perceptions of trust and value that customers had of this group in comparison to other Agilent groups. EPSG customers trusted and valued the Agilent brand because they trusted and valued the HP brand. This led Agilent to conclude that trust and value were rated more highly within their heritage businesses.

Agilent's brand tracking study data indicated this on a number of levels. The first level was the score for the question, "Did you really mean Agilent when you said HP?"

Table 2

LOYALTY TO THE HP BRAND IN EPSG

	EPSG Respondents
	N
Mentioned HP	119
Really Meant Agilent	59
% who mentioned HP but meant Agilent	50%

According to the above table, half the EPSG respondents who selected HP as their top-of-mind brand for EPSG products acknowledged that they had really meant Agilent. This showed customers' loyalty towards the HP brand despite the awareness for Agilent.

The second level was the overall attribute ratings. EPSG (and ATG) showed higher attribute ratings in virtually every area, compared to Agilent's newer businesses such as CSG, SPG and LSCA. EPSG and ATG scores by attribute tended to be in the 7.0 to 7.9 range consistently, where attribute scores for the other businesses, on average, were lower. Ratings were on a zero to 10 scale with 10 being the highest. Interestingly, Exhibit 10 shows that the image ratings for *Value* were the lowest across all businesses.

Third, EPSG conducted positioning research with the objective of finding the best possible position for EPSG with its customers (see Exhibit 11). An important finding of the study was that customers desired Agilent to retain the HP 'days' of customer service. They were interested to see Agilent strengthen its position as a true partner of its customers and as an educator of current and emerging test and measurement technology. This again suggested the heritage effect on the perceptions of value and trust among Agilent's EPSG customers.

EPSG's Customers

EPSG's customers are usually engineers. This is apparent from Exhibit 12 which describes the job title of its customers and the departments in a company that make purchase decisions for electronic product and services.

In August 2001, Agilent undertook a study to measure EPSG's brand positioning in United States, Germany, China and Japan (see Exhibit 11). The study included the measurement of five relevant positions of EPSG among its customers: Classic Product, Measurement Guru, Engineering Guide, Integrator, and Mentor. The study gauged the success of a potential positioning by measuring responses to a set of resonance factors such as the customer's positive initial reaction and the relevance, believability and ownability of the position. The higher the score of these factors, the more relevant Agilent's brand was for those customers.

While Agilent did not directly ask customers what trust and value meant to them, it explored various positioning statements that ranged from simply being a supplier of products to that of a vendor that supported the customer with knowledge and services that aided them in their test and measurement challenges. The position that scored the best was that of Mentor — someone who was available, knowledgeable of the customer's challenge, could provide meaningful and relevant information and truly exhibited a "roll up your sleeves" kind of attitude. However, the Mentor position was also appealing because it suggested that customers sensed Agilent's retention of its original HP roots of service.

Table 3

RESULTS OF THE EPSG BRAND POSITIONING STUDY

	Classic Product	Measurement Guru	Engineering Guide	Integrator	Mentor
Initial Appeal	Low	Moderate	Low	Moderate	High
Relevance	Low	Moderate	Low	Moderate	High
Credibility	(NA)	High	Low	Moderate	High
Ownability	(NA)	High	Moderate	High	High

An interesting result was the low perception of EPSG as an 'Engineering Guide' in initial appeal, relevance and credibility, given that engineers are a significant portion of its customer base. One explanation for this low perception was provided by Laura Hammond, EPSG's outbound marketing manager:

Engineers thrive on talking with other engineers, would love to be considered a part of the "Engineering Club," and feel that they have an elite status in life based on their education, their IQ, etc. As a result, they do not want a manufacturer of test instrumentation, a vendor, to share that same status. Therefore, the concept of

Engineering Guide came close to threatening their role There is a very subtle line that they do not want any vendor, Agilent included, to cross. I believe that Engineering Guide almost implied to them that we would lead and they would follow — and that crossed the line.

From other studies, Agilent learnt that EPSG's customers valued other factors such as:

- 1) Speaking with an engineer;
- 2) Saving time solving a test and measurement problem;
- 3) Learning about basic test tips that remind them how to take a measurement;
- 4) Obtaining education on hot industry topics;
- 5) Having price information readily available on Agilent's Web site.

This research information did not go to waste as it led the transformation of the company's communication activities with customers.

The Use of the Internet and the Web site to Build Trust and Value

During the HP days, the regular method of interacting with customers involved either personal visits by sales people or customer calls made to their sales engineer to ask them for specifications. Later, this changed to customers calling a support centre to ask for a data sheet. However, by the late 1990s, the Internet had become a quick, widespread and cost-effective tool for delivering information. Given these advantages of the Internet, Agilent believed it was no longer appropriate, or required, for a sales team to deliver product specifications to a customer. Moreover, Agilent's research had revealed that most of their customers are comfortable with going to a Web site to get detailed information. So the company began to use the Internet to deliver information and communicate with its customers. A key use of Agilent's Web site was to replace the comprehensive Test and Measurement catalogue for which Agilent is famous. Going forward, the company's goal is to add the necessary services and information that will make its Web site a one-stop-shop and help to meet the needs of its busy customers (see Exhibit 13).

Agilent invested heavily to increase the quality and amount of information available to customers via its Web portal Application Central. The portal was positioned as the best place for customers to find answers to difficult questions. Moreover, as staff levels changed, Agilent partnered more aggressively with its 'Knowledge Services Organization,' devoted to providing customers with useful information.

EPSG was also aggressive in using a variety of technologies to reach its customers. These included e-mail, e-mail updates, banner advertising, search engine optimization, pay for position, etc. EPSG's integrated sales model included contact centres around the world for both presales and post sales information. During a recent teleWeb pilot in Korea, more than two-thirds of the customers using the new teleWeb services were previously using face-to-face methods for interfacing with Agilent. EPSG also has an extensive range of e-Seminars that are provided in both a live and archived format. They have found that more than two-thirds of users of these e-seminars are choosing to utilize the archived versions of these seminars.

Hammond described the use of technology for communicating with their customers:

. . . The use of Web-based technology positively affected the perception of value with our customers. EPSG's customers are predominantly electrical engineers. The psychographic profile of engineers consistently describes someone who likes to do their homework first before engaging with a company. Engineers also tend to be people who prefer not to engage in needless personal interaction. In addition, engineers predominantly are already highly Web savvy. These characteristics make Web-based communications solutions highly desirable to this customer segment.

Communication Through Advertising

In June 2003, Agilent launched a new series of brand advertisements. Their primary objective was to communicate Agilent's role and contribution to helping its customers make real progress by enabling profitable, meaningful innovation. Each ad was aimed to deliver on the "value" message by signaling that Agilent understood the most pressing problem its customers were facing and by highlighting specific Agilent solutions that addressed those problems. The ads were not specifically designed to improve customer perception of trust; however, the fact that Agilent was investing in advertising was believed to be important in helping to reinforce the perception of stability and commitment.

The new advertisements highlighted specific examples of Agilent products or technologies that provided solutions to specific customer issues. Further, they allowed each business group to use unique indices of the titles and headers of documents on the Web to direct customers to their Web pages which provided details about those solutions.

Shirley Horn explained how research supported the objectives of the new ads:

We tested this new ad campaign using customer focus groups in the U.S. and Asia. In virtually every case, our customers 'saw themselves' in the ads through the issues being addressed, and were able to articulate the value Agilent brings in helping them solve those problems. The research also confirmed their trust in Agilent as a company that can deliver on the promise of relevant technology and know-how.

Samples of the new Agilent ads are provided in Exhibit 14.

Ongoing Communication Challenges for Building Customer Loyalty

In early 2003, the two most important factors that affected the perceptions of trust and value for Agilent's customers were the downturn and the split. These had implications for marketing activities at both the business and the corporate levels.

At the business level, Hammond was grappling with the strategic question: Which EPSG services should customers receive free of charge and which services should be made "chargeable"? This was particularly important for EPSG since much of the information was available to customers free of charge through the Web site; conversely the face-to-face seminars that covered topics beyond basic information requirements were charged for. This factor was also important for EPSG because, before the split, customers were used to obtaining all information freely and wanted Agilent to retain customer service levels similar to those during the HP days. Therefore, any decision for charging customers would have important implications for *Trust* and *Value*.

At the corporate level, the important issue confronting Horn was to understand the marketing and communication options available for retaining, building and measuring value and trust, given these new market conditions. How will each option affect trust and value, and how can these impacts be measured? Can the Internet completely replace personalized customer service? How will it affect perceptions of value and trust given that heritage customers seem to miss the old HP days? What should they do to ensure a continued profile of longevity, stability and commitment to customers, thereby continuing to build trust among their customers? How can Agilent deliver the expertise and information required by its customers and differentiate itself from the intense competition on the Web?

Going forward, Horn viewed that the key to enhancing value and trust through communications and marketing was to become a deliverer of knowledge rather than just simply delivering messages. This was because Agilent's customers were less likely to pay attention to basic marketing messages and much more likely to

“lean in and listen” if they perceived there was something to be learned from the communication.

Agilent believed that the challenge for their communications professionals during the economic downturn was to prioritize the communication needs by selecting and implementing the programs that would give the best return on investment against the communication goals. During this period, Agilent took great pains to ensure that its communications with customers had the right tone, contained the information customers need, and that they were able to substantiate any claims they made about their products and services. In the future, the impact on *Trust* and *Value* would, however, depend on the business and corporate-level decisions that Agilent would take in response to the continuing economic downturn, budget constraints, evolving nature of technology, and customer loyalty to the former HP brand.

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