

# ***EXHIBIT B***

# ***EXHIBIT B***

*APPENDIX A*

*APPENDIX A*

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11 **ROCKET LAWYER INCORPORATED**

12 **UNITED STATES DISTRICT COURT**  
13 **CENTRAL DISTRICT OF CALIFORNIA**  
14 **WESTERN DIVISION**

15  
16 LEGALZOOM.COM, INC., a Delaware  
17 corporation,

18 Plaintiff,

19 v.

20 **ROCKET LAWYER**  
21 **INCORPORATED**, a Delaware  
corporation,

22 Defendant.

Case No. 2:12-cv-09942-GAF-AGR

**DECLARATION OF DAVID BAGA  
IN SUPPORT OF EXPERT REPORT  
OF JERRY WIND**

Judge: Judge Gary A. Feess  
Courtroom: 740  
255 East Temple Street  
Los Angeles, CA 90012  
Action Filed: November 20, 2012



1           7.       However, Rocket Lawyer continued to disclose the mandatory state  
2 fees associated with business formation on Rocketlawyer.com, which it has been  
3 disclosing since it began offering business formation services in August 2008.

4           8.       In addition, Rocket Lawyer has always disclosed the terms of its free  
5 trial on the same page where the user enrolls in a Rocket Lawyer free trial regardless  
6 of whether the user enrolled during the “blue” format of RocketLawyer.com or the  
7 current “red” format.

8           9.       Older versions of every page of Rocketlawyer.com are not retained in  
9 the ordinary course of business. I do not believe that Rocket Lawyer can recreate  
10 the exact user experience from prior time periods.

11          10.      The Rocket Lawyer consumer journey to complete the questionnaire to  
12 incorporate a business and the substantive information provided, including the  
13 disclosure of state fees, has not significantly changed since Rocket Lawyer began to  
14 offer the incorporation service. Any changes have been generally minor and/or  
15 cosmetic.

16          11.      Rocket Lawyer has always disclosed state fees during the consumer  
17 journey at multiple locations.

18          12.      The screenshot used for “choose your processing,” attached hereto as  
19 **Exhibit A** from the incorporation stimuli was in use on RocketLawyer.com from at  
20 least May 2012 to about December 2013. Prior to May 2012, Rocket Lawyer had a  
21 similar page on the “blue” version of RocketLawyer.com that offered its free trial  
22 and disclosed state fees in a similar manner.

23          13.      The remainder of the screenshots used for the incorporation stimuli  
24 were taken from RocketLawyer.com as it existed in January 2014 unless otherwise  
25 stated in the report.

26          14.      The forms used to create the stimuli for the free trial/other legal  
27 services stimuli – the bill of sale, lease agreement, power of attorney, and divorce  
28 agreement forms – are from our most popular areas of law and account for 21.6% of

1 all forms started on RocketLawyer.com and approximately 19.5% of all clicks that  
2 Rocket Lawyer receives from search engine advertising. They are among our most  
3 popular forms.

4 15. The screenshots used from the free trial/other legal services stimuli are  
5 from RocketLawyer.com as it looked in January 2014 unless otherwise stated in the  
6 report.

7

8 I declare under penalty of perjury under the laws of the State of California  
9 that the foregoing is true and correct. Executed this on 14<sup>th</sup> day of April, 2014 in  
10 San Francisco, California.

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DAVID BACA

# **EXHIBIT A**



## Quick Tasks

Make a document

Talk to a lawyer

Incorporate a business

Share your account

Search



## Incorporation: Interview



## Choose your processing option

Our Rocket Lawyer Specialists have designed our plans to save you time and money. Choose your option below:

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- Incorporation paperwork processing (\$99.95 value)

## PROCESSING ONLY (\$99.95)

- Incorporation paperwork processing

\*Cancel anytime. After your one-week trial ends, you will be billed \$39.95 per month. You can see your full purchase summary including state filing fees on the checkout page.

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- Processing Only

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**(888) 627-1186**  
or email us.

“

It was really easy and intuitive to incorporate my property management business with Rocket Lawyer. They gave me everything I needed, and it was a straightforward process.

- Jerry, Lawrenceville

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(877) 881-0947

Call us Monday-Friday 6am-6pm PT

Email us



***APPENDIX B***

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## YORAM (JERRY) WIND

**Academic Positions:** Jerry Wind is The Lauder Professor and Professor of Marketing at The Wharton School of the University of Pennsylvania. He is the founding director of the Wharton "think tank," *The SEI Center for Advanced Studies in Management*. The Center's mission is to assure, through research and development, the quality, relevance, and impact of management research, education, and practice. Dr. Wind joined the Wharton faculty in January 1967, upon receipt of his doctorate from Stanford University.

**Program Development:** Dr. Wind is the founder and academic director of *The Wharton Fellows* program. From 1983 to 1988, he was the founding director of *The Joseph H. Lauder Institute of Management and International Studies*, and from 1980 to 1983 the founding director of *The Wharton Center for International Management Studies*. Dr. Wind chaired the Wharton committees that designed *The Wharton Executive MBA Program* (1974), *the new MBA curriculum* (1991), the School's *globalization strategy* (1995-1997), and the MBA's cross-functional integration efforts (2002-04). He also started *The Wharton International Forum* (1987) and served as the chairman of its faculty council until 1998. He was instrumental in establishing the Alfred West, Jr. Learning Lab and served as a member of its first advisory board (2001-05).

**Publications:** Dr. Wind is one of the most cited authors in marketing. His regular contributions to professional marketing literature include 23 books and over 250 papers, articles, and monographs encompassing the areas of marketing strategy, marketing research, new product and market development, consumer and industrial buying behavior, and global marketing. Dr. Wind's books have received wide acclaim and many have been translated into a number of languages. His most recognized publications include: *Competing in a Flat World*, with Victor and William Fung (Wharton School Publishing 2007), *The Power of Impossible Thinking: How Changing Your Mental Models Will Transform the Business of Your Life and the Life of Your Business*, with Colin Crook (Wharton School Publishing 2004), *Convergence Marketing: Strategies for Reaching the New Hybrid Consumer* with Vijay Mahajan (Financial Times/Prentice Hall 2002), and *Driving Change* with Jeremy Main (Free Press 1998). Both *The Power of Impossible Thinking* and *Convergence Marketing* were selected by Executive Book Summaries as one of the thirty best business books of 2002 and 2004. His recent edited books— *The Network Challenge: Strategy, Profit and Risk in an Interlinked World* (Wharton School Publishing, June 2009), *New Product Diffusion Models* (Kluwer 2000), *Digital Marketing* (Wiley 2001), and *Marketing Research and Modeling: Progress and Prospects* (Kluwer 2004)—include the works of the leading experts on these topics. In 2012, Sage will publish an 8-volume edited anthology of Dr. Wind's publications through the *Legends of Marketing* Series.

**Editorship:** Dr. Wind founded *Wharton School Publishing* (Wharton's J.V. with Pearson) (2003) and served as the first Wharton editor (2003-2008). He has served as editor-in-chief of the *Journal of Marketing*, on the policy boards of the *Journal of Consumer Research* and *Marketing Science*, and has been on the editorial boards of the major marketing journals. He has been a guest editor of special issues of the major marketing journals including *Marketing Science* (1996) on Empirical Generalization in Marketing (with Frank Bass), *JMR* (1978) on market segmentation and (1997) on Innovation in New Product Development and *Marketing Research* (1998) on The State of the Art in Quantitative Research.

**Business Experience:** Dr. Wind has served as an advisor to many Fortune 500 firms and a number of non-U.S. multinationals in the financial services, pharmaceuticals, information, and consumer packaged goods industries. His consulting focuses on both overall global corporate and business strategy and transformation as well as marketing strategy and especially the development of new businesses. He is a regular advisor to SEI and a member of their executive committee. In addition, he has served as an expert witness in various legal cases. Dr. Wind is a member of the advisory board of a number of start-ups including Decision Lens. He is a former director of IDT (HK), Enhance Financial Services Corporation, Contel Corporation, CASA and a number of entrepreneurial ventures.

**Professional Activities:** Dr. Wind is an active member of the major marketing and management science professional associations. He is the former Chancellor of the International Academy of Management (IAM). He is a former academic trustee of the Marketing Science Institute and former chairman of the College of Marketing of the Institute of Management Science. He is a member of the Board of Directors of the Marketing Accountability Standards Board. He is one of the founders of the Israeli university—*The Interdisciplinary Center Herzliya* (IDC) (1994), chairman of its academic council, and member of its academic appointment and promotion committee. He is also a member of the board of the American Friends of IDC. He is a member of the boards of a number of Wharton's centers, including the Lauder Institute and Knowledge@Wharton; a trustee of *The Philadelphia Museum of Art*, chairman of the marketing committee and member of its digital age committee. He is a frequent lecturer in faculty seminars and executive programs in over 50 universities worldwide.

**Awards:** Dr. Wind is the recipient of various awards, including the four major marketing awards—The Charles Coolidge Parlin Award (1985), the AMA/Irwin Distinguished Educator Award (1993), the Paul D. Converse Award (1996) and the Buck Weaver Award (2007). He is the recipient of the first Faculty Impact Award given by Wharton Alumni (1993). In 1984, he was elected as member of the Attitude Research Hall of Fame and has won a number of research awards, including two Alpha Kappa Psi Foundation awards and a recent inclusion in *JAR Classics* issue of 18 articles that have withstood the test of time. In 2001 he was selected as one of the 10 *Grand Auteurs in Marketing* and later named as the 2003 recipient of the Elsevier Science Distinguished Scholar award of the Society for Marketing Advances. In May 2004 he was awarded as Honorary Fellow of the Decade by the Interdisciplinary Center Herzliya (Israel). In 2009, Dr. Wind was selected as one of the 10 *Legends of Marketing* and in 2013 Sage will publish 8 edited volumes anthologizing his various publications.

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# 1. ACADEMIC EXPERIENCE

## EDUCATION

Stanford University, Graduate School of Business. Ph.D. (Marketing), September 1964-December 1966.

Stanford University, International Center for Advancement of Management Education, Certificate in Marketing Management. September 1963-June 1964.

The Hebrew University, Jerusalem, School of Economics and Social Sciences, M.A. (Business Administration and Political Science), September 1961-June 1963; B. Soc. Sci. (Economics and Political Science), September 1958-June 1961.

## UNIVERSITY POSITIONS

### A. University of Pennsylvania, The Wharton School

#### Faculty Positions:

The Lauder Professor, 1983-present  
Professor of Marketing, 1973-present

-----  
Associate Professor of Marketing, 1970-1973  
Assistant Professor of Marketing and International Business, 1967-1970

#### Selected Administrative Positions:

Founding Academic Director, The Wharton Fellows program and network , 2000-present  
Founding Director, The SEI Center for Advanced Studies in Management, 1988-present  
Founding Academic Director, The Future of Advertising Program, 2008-present

-----  
Founding Editor, Wharton School Publishing (WSP), 2003-2008  
Founding Director, The Joseph H. Lauder Institute of Management and International Studies, 1983-1988  
Founding Director, the 1st Title VI National Resource Center in International Management Studies, 1985-1988  
Founding Director, The Wharton Center for International Management Studies, 1980-1983

#### Secondary Faculty Appointments:

Member of the Graduate Group in International Studies (School of Arts & Sciences), 1984-1998  
Member of the OR Group, 1979-1984 and the OR affiliated faculty, 1984-1989  
Senior Fellow of the Leonard Davis Institute, 1977-1980  
Secondary Appointment as Professor of Management, 1981-1984  
Member of the Extended Faculty of the Social Systems Sciences Dept. 1981-1986

### B. Other Universities

The Interdisciplinary Center (IDC) Herzliya Israel, Co-Founder (for specific activities since 1994, see p. 66).

University of Tokyo (Japan) Co-Director of the Marunouchi Global Center (MCG) program, 2002; The First Hakuodo Visiting Professorship, Spring 1992 and 1993.

Erasmus University (The Netherlands) The First Visiting Unilever-Erasmus Professorship, Spring 1993.

University of New South Wales (Australia) The First Visiting Hoover Foundation Professor, 1977.

University of California at Berkeley, School of Business Administration Visiting Professor, Fall 1975.

University of Tel Aviv, The Leon Recanati Graduate School of Business Administration, Visiting Senior Lecturer, September 1968-August 1969.

Stanford University, Graduate School of Business, Research Assistant, June 1965-October 1966.

The Hebrew University Jerusalem, Teaching Assistant in the Departments of Political Science and Business Administration, September 1961-June 1963.



## 2. PUBLICATIONS

### I. BOOKS

1. Fung, Victor K., William K. Fung and Yoram (Jerry) Wind. \*Competing in a Flat World: Building Enterprises for a Borderless World. Upper Saddle River: Wharton School Publishing, 2007. [Translated editions: Bahasa Indonesia; Chinese Simplified; Chinese Traditional; English (India); Italian; Korean; Polish; Portuguese; Spanish; Italian; Bahasa Indonesian; Turkish.]
2. Wind, Jerry, Colin Crook and Robert E. Gunther. \*The Power of Impossible Thinking: Transform the Business of Your Life and the Life of Your Business. Upper Saddle River: Wharton School Publishing, 2004. Selected by Executive Book Summaries as one of the thirty best business books of 2004. [Translated editions: Arabic; Bahasa Indonesia; Bulgarian; Chinese (simplified and traditional); English (Singapore); Italian; Japanese; Korean; Polish; Portuguese; Russian; Serbian; Spanish; Thai; and Turkish.] Selected by Executive Book Summaries as one of the thirty best business books of 2004; finalist in *Fast Company* Reader's Choice Award for the October book of the month; among CEO READ top 25 books of August 2004. A paperback edition was published in 2006.
3. Krieger, Abba, Paul E. Green and Jerry Wind. Adventures in Conjoint Analysis: A Practitioner's Guide to Trade-Off Modeling and Applications. Philadelphia: The Wharton School, 2004 < <https://marketing.wharton.upenn.edu/faculty/green/monograph/> >.
4. Wind, Yoram (Jerry), Vijay Mahajan and Robert Gunther. \*Convergence Marketing: Strategies for Reaching the New Hybrid Consumer. Upper Saddle River: Prentice Hall, 2002. Selected by Executive Book Summaries as one of the thirty best business books of 2002. Translated editions: Chinese (simplified), Tsingua University Press; Chinese (traditional), Prentice Hall Taiwan; Bahasa (Indonesia); Spanish; Portuguese; Italian [*Consumatore Centauro: Orvaro il Marketing Della Convergenza*, ETAS LAB. IT. 2002]; Korean; and Japanese.
5. Fields, George, Hotaka Katahira, Jerry Wind and Robert E. Gunther. Leveraging Japan: Marketing to the New Asia. San Francisco: Jossey-Bass, 1999.
6. Wind, Yoram and Jeremy Main. \*Driving Change: How the Best Companies are Preparing for the 21<sup>st</sup> Century. New York: The Free Press, 1997. Translated editions in U.K. by Kogan (Page Ltd.), 1998; China by Shanghai Jiao (Tong University Press), 1999; Hungary by Veres István (Geomeédia Szakkönyvek), 2000. Adaptation to local condition: Brazil by Luiz Felipe Monteiro Jr. (IBMEC Qualitymark Editoria), 2002.
7. Bauer, Roy A., Emilio Collar, Victor Tang, Jerry Wind and Patrick R. Houston. The Silverlake Project: Transformation at IBM. New York: Oxford University Press, 1992. Translated to Chinese, Huaxia Publishing, 2000.
8. Wind, Yoram. \*Product Policy: Concepts, Methods and Strategies (Addison-Wesley Marketing Series). Reading: Addison-Wesley, 1982. Reviewed in the *Journal of Marketing*, Summer 1981.
9. Wind, Yoram. \*Marketing and Product Planning (in Spanish). Mexico: Expansion, 1979. This book is based in part on sections from *Product Policy* which was selected by the editors of Expansion as the "Book of the Year" 1979.
10. Wind, Yoram, Paul E. Green and Douglas Carroll. Multi-Attribute Decisions in Marketing: A Measurement Approach. Hinsdale: The Dryden Press, 1973.
11. Webster, Frederick E. and Yoram Wind. Organizational Buying Behavior (Foundations of Marketing). Englewood Cliffs: Prentice Hall, 1972. Translated to Portuguese (Editor, Atlas, Sao Paulo, Brazil, 1975). Reviewed JMR, August 1974.

12. Wind, Yoram, Ronald E. Frank and William F. Massy. Market Segmentation (International Series in Management). Englewood Cliffs: Prentice Hall, 1972. Reviewed JMR, November 1972; August 1974.
13. Wind, Yoram, Homer Dalby and Irwin Gross. Advertising Measurement and Decision Making. Boston: Allyn & Bacon, 1968.
14. Robinson, Patrick J. and Yoram Wind. Industrial Buying and Creative Marketing. Boston: Allyn & Bacon, 1967.  
Contributed two chapters; co-authored with Patrick J. Robinson three chapters; and participated in the overall organization and preparation of the book.
15. Yoram Wind. Industrial Buying Behavior: Source Loyalty in the Purchase of Industrial Components. Unpublished Ph.D. dissertation, Stanford University, 1966.

## II. EDITED BOOKS

1. Wind, Yoram and Paul Kleindorfer, eds., The Network Challenge: Strategy, Profit and Risk in an Interlinked World. Wharton School Publishing, 2009.
2. Wind, Yoram (Jerry) and Paul E. Green, ed., \*Marketing Research and Modeling: Progress and Prospects. Norwell: Kluwer Academic Publishers, 2004.
3. Wind, Jerry and Vijay Mahajan, ed. Digital Marketing: Global Strategies from the World's Leading Experts. New York: John Wiley & Sons, 2001.
4. Mahajan, Vijay, Eitan Muller and Yoram Wind, ed. New-Product Diffusion Models. Boston: Kluwer 2000.
5. Mahajan, Vijay and Yoram Wind, ed. Innovation Diffusion Models of New Product Acceptance. Cambridge: Ballinger Publishing Co., 1986.
6. Wind, Yoram, Vijay Mahajan and Richard N. Cardozo, ed. New-Product Forecasting: Models and Applications. Lexington: Lexington Books, 1981.
7. Wind, Yoram and Robert J. Thomas, ed. Advances in Organizational Buying Research: The Case of Acquisition of Scientific and Technical Information. Washington, D.C: National Science Foundation, 1979.
8. Wind, Yoram and Marshall Greenberg, ed. Moving Ahead with Attitude Research: Proceedings of the Seventh Attitude Research Conference. Chicago: American Marketing Association, 1977.
9. Nicosia, Francesco M. and Yoram Wind, ed. Behavioral Models for Market Analysis: Foundations for Marketing Action. Hinsdale, IL: The Dryden Press, 1977.

## III. BOOKS UNDER DEVELOPMENT

1. Wind, Yoram and the Future of Advertising Team. Preparing for Advertising 2020 Now. Forthcoming.
2. Wind, Yoram, ed. "Paul Green Contributions to Clustering and Segmentation." Paul Green Sage Series on Legends of Marketing, Forthcoming.

3. Wind, Yoram. "Marketing Strategy Analysis," NOW The Essence of Knowledge: Foundations and Trends in Marketing, Forthcoming.
4. Bell, David and Wind, Yoram. "Market Segmentation Uncut: A Practitioner's Guide to Understanding and Implementing The Most Powerful Concept in Marketing." NOW The Essence of Knowledge: Foundations and Trends in Marketing, Forthcoming.
5. Wind, Yoram. "Creating a Creative Organization."
6. Yoram Wind Legends in Marketing: forthcoming 2013 from Sage Publications:  
*Organizational Buying Behavior*, (ed) Robert Thomas  
*Consumer Behavior*, (eds) Barbara Kahn and Robert Meyer  
*Product and New Product Management*, (ed) Vijay Mahajan,  
*Marketing Strategy*, (ed) David Reibstein  
*Market Segmentation*, (ed) David Bell  
*Global Marketing*, (ed) Arun Jain  
*Marketing Research and Modeling*, (ed) Vithala Rao  
*The Future of Marketing*, (ed) George Day

#### IV. ARTICLES, CONTRIBUTED CHAPTERS, PAPERS IN PROCEEDINGS, AND WORKING PAPERS

The papers are grouped by the following topics:

1. Portfolio analysis and strategy
2. Marketing and business strategy
3. Marketing and product strategy
4. Research on industrial buying behavior
5. Research on consumer behavior
6. Marketing research and modeling
7. International marketing
8. International management education and the Lauder Institute
9. Management practice and education in the 21st Century
10. Convergence Marketing
11. Mental Models – Power of Impossible Thinking
12. Network-Based Strategies
13. Advertising
14. Entries in Dictionaries, Encyclopedias, and Handbooks

##### A. Portfolio Analysis and Strategy

1. Wind, Yoram. "Product Portfolio: A New Approach to the Product Mix Decision." Combined Proceedings. Ed. Ronald C. Curhan. Chicago: American Marketing Association, Aug. 1974. 460-464.  
[http://dl.dropbox.com/u/9686940/windj/7401\\_Product\\_Portfolio\\_A\\_New\\_Approach.pdf](http://dl.dropbox.com/u/9686940/windj/7401_Product_Portfolio_A_New_Approach.pdf).
- 2\*. Wind, Yoram, and Henry J. Claycamp. "Planning Product Line Strategy: A Matrix Approach." Journal of Marketing 40 (Jan. 1976): 2-9.  
[http://dl.dropbox.com/u/9686940/windj/7601\\_Planning\\_Product\\_Line\\_Strategy\\_A.pdf](http://dl.dropbox.com/u/9686940/windj/7601_Planning_Product_Line_Strategy_A.pdf).
3. Wind, Yoram and Daniel Gross. "An Analytic Hierarchy Process for the Allocation of Resources Within a Target Product/Market/Distribution Portfolio." Proceedings of the First

- ORSA/TIMS Special Interest Conference on Market Measurement and Analysis. Eds. David B. Montgomery and Dick R. Wittink. Cambridge, MA: Marketing Science Institute, 1980. 278-297. <[http://dl.dropbox.com/u/9686940/windj/8001\\_An\\_Analytic\\_Hierarchy\\_Process\\_For.pdf](http://dl.dropbox.com/u/9686940/windj/8001_An_Analytic_Hierarchy_Process_For.pdf)>.
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[http://dl.dropbox.com/u/9686940/windj/9702\\_Issues\\_and\\_Opportunities\\_in\\_New.pdf](http://dl.dropbox.com/u/9686940/windj/9702_Issues_and_Opportunities_in_New.pdf)
- *Marketing Science* –

- “Empirical Generalizations in Marketing” (with Frank M. Bass), Vol. 14, No. 3, Part 2, 1995.
- *Management Science* (with John Farley and Diana L. Day) – “The State of The Art in Theory and Methods for Strategy Research,” 1990.
- *The Wharton Quarterly*, “Marketing,” Fall 1972.  
[http://dl.dropbox.com/u/9686940/windj/7201 The Step Children of Marketing.pdf](http://dl.dropbox.com/u/9686940/windj/7201%20The%20Step%20Children%20of%20Marketing.pdf)

## VI. EDITORIALS

<i>Journal of Consumer Research</i>	June 1977:	"New Directions for JCR"	
<i>Marketing News</i>	July 1978:	"New Directions for JM"	
<i>Journal of Marketing</i>	Winter 1979:	"The <i>Journal of Marketing</i> at a Crossroad"	
	Spring 1979:	"Repositioning the <i>Journal</i> "	
	Summer 1979:	"Bridging the Gap Between Practitioners and Academicians"	
	Fall 1979:	"On the Status of Marketing Theory"	
	Winter 1980:	"Marketing in the 80's"	
	Spring 1980:	"Strategic Planning and Marketing: Time for a Constructive Partnership," with George Day	
	Summer 1980:	"International Marketing: The Neglect Continuous," with John Farley	
	Fall 1980:	"Industrial Marketing: The Sleeping Giant," with Frederick Webster	
			<a href="http://www.marketingpower.com/ResourceLibrary/JournalofMarketing/Pages/1980/44/4/4997918.aspx">http://www.marketingpower.com/ResourceLibrary/JournalofMarketing/Pages/1980/44/4/4997918.aspx</a>
		Winter 1981:	"Journals and the Development of a Discipline"
	Spring 1981:	"Research and Management"	
	Summer 1981:	"A Positive Perspective on Marketing"	
		<a href="http://connection.ebscohost.com/c/editorials/4996997/from-editor-positive-perspective-marketing">http://connection.ebscohost.com/c/editorials/4996997/from-editor-positive-perspective-marketing</a>	
	Fall 1981:	"Reflections"	
	Summer 2009:	"Is Marketing Academia Losing its Way?"	
		<a href="http://www.iimahd.ernet.in/library/PDFs/NICMAN/Is%20marketing%20academia%20losing%20its%20way.pdf">http://www.iimahd.ernet.in/library/PDFs/NICMAN/Is%20marketing%20academia%20losing%20its%20way.pdf</a>	
<i>The Lauder Quarterly</i>	All editorials from initiation in 1986 to July 1988.		

## VII. ILLUSTRATIVE OP ED AND COMMENTARIES

- “Capitalism 3.0: Commentaries” on Jed Emerson and Sheila Bonini, “Capitalism 3.0” in *VALUE* and [www.valuenetwork.com](http://www.valuenetwork.com), February/March 2006.
- Orchestra needs to change tune in contract negotiations: Settling the score must rest on the idea of working toward a collective goal, *Philadelphia Inquirer*, Commentary, November 4, 2004.
- The Wisdom of the Flip Flop, *Wharton School Publishing Newsletter*, November 2004.
- Rethinking our mental models for elections, *Newsletter of the Wharton Fellows*, November 2004.
- “E-Learning Crossfire,” *Information Week*, February 26, 2001.
- “Reverse mentoring can solidify collaboration among functional groups, but it cannot be the only tool that enforces such teamwork or the sole catalyst for change.” Commentator on HBR “Too Old to Learn?” Case Study. *Harvard Business Review*. November-December 2000.

## VIII. EDITED PUBLICATIONS OF THE SEI CENTER – ILLUSTRATIVE LIST \*\*

\*\* Recent presentations are listed by topic beginning on page 76

- Insights and Impact: 20th Anniversary Report of the SEI Center for Advanced Studies in Management, March 2010.
- Into the 21<sup>st</sup> Century: The First Decade and Beyond: A Report on the SEI Center for Advanced Studies in Management, 1990-2000.
- Japan at the Great Divide, April 1999 (by Yasuhisa Shiozaki).
- The Limits of Privacy, March 1999 (by Amitai Etzioni).
- GM for the 21<sup>st</sup> Century: From “Make and Sell” to “Sense and Respond,” March 1999 (by Vince Barabba).
- Managing Workteam Diversity, Conflict, and Productivity: A New Form of Organizing in the 21<sup>st</sup> Century Workspace, September 1998 (by Ety Jehn, The Diversity Research program with Bob Holland).
- The Systems Approach: The New Generation, February 1998.
- Consumer Choice Behavior in On-line and Regular Stores: The Effects of Brand Name, Price, and Other Search Attributes, January 1998.
- When Is It Worthwhile Targeting the Majority Instead of the Innovators in a New Product Launch? November, 1997.
- Toward New Corporate Governance Models: Lessons from the Japanese and U.S. Experience, March 1997.
- From Detection to Action: Processes and Insights Gained from an Early Warning Signal System, March 1997.
- New Media, February 1997.
- The Future of Impact of Information Management: A Lecture Series from July 1996-January 1997.
- The CEO Challenge: Implementing Strategy in a Constantly Changing Marketplace, December 1996.
- European Venture Capital Industry, November 1996.
- The Impact of Computers and Information on Management: 1946-1996-2001, May 1996.
- A Trapezoidal Corporation, February 1996.
- Corporate Growth Engines, December 1995.
- The Bamboo Network, November 1995.
- Innovation in New Product Development: Best Practices in Research, Modeling and Applications, May 1995.
- The New Science and Emerging Paradigms in Business, April 1995.
- Information Technology and the Changing Boundaries of the Firm, January 1995.
- EMU – The Road to Europe, February 1995.
- Go West Young MBA, Far Far West: Adventures on the World’s Business and Management Frontier, January 1995.
- The Virtual University, January 1995.
- A New Management Paradigm for the 21<sup>st</sup> Century, December 1994.
- Leadership in the 21<sup>st</sup> Century Enterprise, November 1994.
- Interactive Industry 2000: Who’s Gonna Buy this Stuff: Research for the Interactive Television Business, July 1994.
- Interactivity is Two-Way: Life on the Net April 1994.
- Exploratory Conference on Business Ethics: Building the Common Ground, March 1994.
- Beyond Quality: Organizational Transformation for the 21<sup>st</sup> Century Enterprise, March 1994.
- Empirical Generalizations in Marketing, February 1994.
- Research Challenges in Linking Quality: Profitability and Organizational Architecture, December 1993.
- Deploying Strategic Assets: Beyond Core Capabilities, November 1993.
- The End of Diversity: Rights, Responsibility and the Communication Agenda November 1993.
- The Horizontal Organization, October 1993.
- Strategic Information Architecture: Increasing Productivity, Managing Risks, June 1993.
- Corporate Performances: Beyond Financial Measures, April 1993.
- Dr. Peter Drucker on “The New Organization,” April 1993.
- Designing Corporate Governance for the 21<sup>st</sup> Century Global Enterprise: International Perspectives, January 1993.

- Rewarding the Workforce of the Future: Competence-Based Performance Measures and Incentives, October 1992.
- Issues and Advances in New Product Development, June 1992.
- Decision Making in Highly Uncertain Political Environments: Investing in the Russian Oil and Gas Industry, March 1992.
- Historical Perspectives in Management Education, April 1992.
- Innovation and Learning, March 1992.
- Frontiers in Electronic Commerce: Experimental Systems for Communication, Coordination, and Negotiation, February 1992.
- The Impact of Information Networking on Organizational Design and Strategy, November 1991.
- Visionary Leadership, October 1991.
- Innovation in Services, May 1991.
- Lessons from the Malcolm Baldrige Award: Implications for Management Practice, Research, and Education, February 1991.
- Managing Infrastructure Costs; What is the Best Strategy for Long-Term Controls? February 1991.
- Managing Infrastructure Costs; What is the Best Strategy for Long-Term Controls? February 1991.
- Ethical Standards for Global Corporations? December 1990.
- Innovation and New Product Development for the 21<sup>st</sup> Century Enterprise, November 1990.
- The Individually Empowered Organization, November 1990.
- Management in the 21<sup>st</sup> Century: Predictions From Top Think Tanks, September 1990.
- Corporate Governance: Who's in Charge?, May 1990.
- Creating and Implementing Quality in Organizations, March 1990.
- Creating and Implementing a Corporate Vision, January 1990.
- Human Resources: Management for the 21<sup>st</sup> Century, January 1990.
- The Impact of Artificial Intelligence on Management Decision Making and Organizational Design, February 1990.

## IX. Edited Publications of the Wharton Future of Advertising Program

Wharton Knowledge in Action Column on Think with Google Forum, 2012.

<http://www.thinkwithgoogle.com/insights/forum/> :

1. Jerry Wind, [Orchestration as the New Managerial Model in the Digital Age](#)
2. David Bell, [Thin-Slicing and Retailing on the Internet](#)
3. Robert Malcolm & Peter Sieyes, [From Bowling to Pinball – how successful marketing organizations are adapting to digital](#)
4. Kartik Hosanagar, [Attribution: Who gets the Credit for a New Customer?](#)
5. Dave Reibstein, [The Many Flavors of ROI](#)
6. Eric Bradlow, [The Golden Age of Marketing Research](#)
7. Shawndra Hill, [Social TV: Linking Content, Buzz and Sales](#)
8. Kevin Werbach, [Turn Your Customers into Players: Lessons from Gaming](#)
9. Leonard Lodish, [When the Parts are more Powerful than the Sum](#)

## X. EDITOR: WHARTON SCHOOL PUBLISHING BOOKS

### 2008

1. V. Kumar, Managing Customers for Profit: Strategies to Increase Profits and Build Loyalty
2. Stewart Black, Hal Gregersen, It Starts with One: Changing Individuals Changes Organizations
3. Russell E. Palmer, Ultimate Leadership: Winning Execution Strategies for Your Situation
4. J.C. Larreche, The Momentum Effect: How to Ignite Exceptional Growth
5. Yves Doz, Mikko Kosonen, Fast Strategy: How strategic agility will help you stay ahead of the game
6. Russell L. Ackoff, Daniel Greenberg, Turning Learning Right Side Up: Putting Education Back on Track
7. Bernard Lewis, Buntzie Ellis Churchill, Islam: The Religion and the People



8. Alexander B. van Putten, Ian C. MacMillan, *Unlocking Opportunities for Growth: How to Profit from Uncertainty While Limiting Your Risk*
9. Vijay Mahajan, *Africa Rising: How 900 Million African Consumers Offer More Than You Think*
10. Michael A. Roberto, *Know What You Don't Know: How Great Leaders Prevent Problems Before They Happen (Rough Cuts)*
11. Jon M. Huntsman, *Winners Never Cheat: Even in Difficult Times, New and Expanded Edition*

## 2007

1. Aswath Damodaran, *Strategic Risk Taking: A Framework for Risk Management*
2. Rajendra S. Sisodia, David B. Wolfe, Jagdish N. Sheth, *Firms of Endearment: How World-Class Companies Profit from Passion and Purpose*
3. Leonard M. Lodish, Howard L. Morgan, Shellya Archambeau, *Marketing That Works*
4. Howard Moskowitz, Alex Gofman, *Selling Blue Elephants: How to Make Great Products That People Want BEFORE The Even Know They Want Them*
5. Daniel M. Cable, *Change to Strange: Create a Great Organization by Building a Strange Workforce*
6. Jagdish N. Sheth, *The Self-Destructive Habits of Good Companies...And How to Break Them*
7. Bala Chakravarthy and Peter Lorange, *Profit or Growth, September.*
8. Victor K. Fung, William K. Fung, Jerry (Yoram) Wind, *Competing in a Flat World: Building Enterprises for a Borderless World, September.*
9. Barry Libert, Jon Spector, Don Tapscott, *We Are Smarter Than Me: How to Unleash the Power of Crowds in Your Business, September.*
10. Hamid Bouchikhi, John R. Kimberly, *Soul of the Corporation, The: How to Manage the Identity of Your Company, September.*
11. Hunter Hastings, Jeff Saperstein, *Improve Your Marketing to Grow Your Business: Insights and Innovation That Drive Business and Brand Growth, October.*
12. Satish Nambisan and Mohanbir Sawhney, *The Global Brain: Your Roadmap for Innovating Faster and Smarter in a Networked World, October.*
13. James F. Parker, *Do The Right Thing: How Dedicated Employees Create Loyal Customers and Large Profits, November.*
14. Ellen Ernst Kossek and Brenda A. Lautsch, *CEO of Me: Creating a Life that Works in the Flexible Job Age, December*

## 2006

1. Peter Navarro, *The Well Timed Strategy: Executing Strategy Through the Business Cycle for Competitive Advantage*
2. Stuart Lucas, *Wealth: Grow It, Protect It, Spend It and Share It (Paperback, 2007)*
3. Peter Killing, Thomas Malnight, and Tracey Keys, *Must-Win Battles: How to Win Them, Again and Again*
4. Neil Bender, Paul Farris, Philip Pfeifer, and Dave Reibstein, *50+ Marketing Metrics Every Business Executive Should Know*
5. Russell Ackoff, Herbert Addison, and Jason Magidson, *Idealized Design: How to Dissolve Tomorrow's Crisis...Today*
6. Lars Kolind, *The Second Cycle: 7 Proven Tools for Revitalizing Your Business...Before It's Too Late*
7. George Chacko, Anders Sjoman, Hideto Motohashi, and Vincent Dessain, *Credit Derivatives: Introduction to Credit Risk and Credit Instruments*
8. Jerry Porras, Stewart Emery, and Mark Thompson, *Success Built to Last: Creating a Life that Matters*
9. Philip Kotler and Nancy Lee, *Marketing in the Public Sector: A Roadmap for Improved Performance*

## 2005

1. Randall Billingsley, *Understanding Arbitrage: An Intuitive Approach to Financial Analysis*
2. Tony Davila, Marc Epstein, and Robert Shelton, *Making Innovation Work: How to Manage It, Measure It, and Profit from It*
3. Sunil Gupta and Donald Lehmann, *Managing Customers as Investments: The Strategic Value of Customers in the Long Run*

4. Stuart Hart, *Capitalism at the Crossroads: The Unlimited Business Opportunities in Solving the World's Most Difficult Problems* (2<sup>nd</sup> Edition, 2007)
5. Lawrence Hrebiniak, *Making Strategy Work: Leading Effective Execution and Change*
6. Jon Huntsman, *Winners Never Cheat: Everyday Values We Learned as Children (But May Have Forgotten)*
7. Eamonn Kelly, *Powerful Times: Rising to the Challenge of Our Uncertain World*
8. Doug Lennick and Fred Kiel, *Moral Intelligence: Enhancing Business Performance and Leadership Success* (Paperback, 2007)
9. V. J. Mahajan and Kamini Banga, *The 86 Percent Solution: How to Succeed in the Biggest Market Opportunity for the Next 50 Years*
10. Alred Marcus, *Big Winners and Big Losers: The 4 Secrets of Long-Term Business Success and Failure*
11. Kenichi Ohmae, *The Next Global Stage: Challenges and Opportunities in Our Borderless World*
12. Michael Roberto, *Why Great Leaders Don't Take Yes for an Answer: Managing for Conflict and Consensus*
13. Arthur Rubinfeld and Collins Heminway, *Built for Growth: Expanding Your Business Around the Corner or Across the Globe*
14. David Sirota, Louis Mischkind, Michael Meltzer, *The Enthusiastic Employee: How Companies Profit by Giving Workers What They Want.*
15. Thomas Stalkamp, *SCORE!: A Better Way to Do Business: Moving from Conflict to Collaboration*
16. Glen Urban, *Don't Just Relate – Advocate!: A Blueprint for Profit in the Era of Customer Power.*
17. Craig Vogel, Jonathan Cagan, and Peter Boatwright, *The Design of Things to Come: How Ordinary People Create Extraordinary Products.*

## 2004

1. Bernard Baumohl, *The Secrets of Economic Indicators: Hidden Clues to Future Economic Trends and Investment Opportunities* (2<sup>nd</sup> Edition, 2007)
2. Sayan Chatterjee, *Failsafe Strategies: Profit and Grow from Risks that Others Avoid*
3. Robert Mittelstaedt, *Will your Next Mistake Be Fatal? Avoiding the Chain of Mistakes that Can Destroy your Organization*
4. Mukul Pandya, Robbie Shell, Susan Warner, Sandeep Junnarkar, Jeffrey Brown (2004), *Nightly Business Report Presents Lasting Leadership: What You can Learn from the Top 25 Business People of our Time* (Paperback, 2006)
5. C.K. Prahalad, *The Fortune at the Bottom of the Pyramid* (Paperback, 2006)
6. Scott Shane, *Finding Fertile Ground*
7. Oded Shenkar, *The Chinese Century: The Rising Chinese Economy and Its Impact on the Global Economy, the Balance of Power, and your Job* (Paperback, 2006)
8. Jerry Wind and Colin Crook, *The Power of Impossible Thinking* (Paperback, 2006)

## XI. ILLUSTRATIVE PUBLISHED ABSTRACTS OF PAPERS DELIVERED IN PROFESSIONAL MEETINGS

- “Enduring Vs. Situation Dependent Customer Characteristics as Bases for Market Segmentation: An Evaluation,” in David L. Sparks, (ed.), *Broadening the Concepts of Marketing*. Proceedings of the American Marketing Association, August 1970 Conference.
- “Preference of Relevant Others and Individual Choice Models,” in W.L. Nichols, ed., *Proceedings of the 1974 AAPOR Conference and in Public Opinion Quarterly*, 38. Fall 1974, pp. 447.
- “Multivariate Decision-Making in the Setting of Pulmonary Outpatient Clinic,” with Lawrence Spitz and Ronald Daniele. Paper presented at American College of Physicians, San Francisco, April 1975.
- “Diagnosis Consumer Behavior: A Quantitative Approach,” in D. Rothwell, (ed.), *Proceedings of the 30<sup>th</sup> Annual AAPOR Conference* May 1975 and in *Public Opinion Quarterly*, 39. Fall 1975, pp. 415.
- “Segmentation and Positioning of Health Insurance Services Under Conditions of Heterogeneous Health Insurance Portfolios,” in TIMS/ORSA Bulletin for the S.F. Joint Meeting, May 1977, pp. 244.

- “Alternative Approaches to Industrial Market Segmentation,” with Paul E. Green, in TIMS/ORSA Bulletin for the S.F. Joint Meeting, May 1977, pp. 234.
- “Innovation and the R&D-Marketing Interface,” with Joel Goldhar, in TIMS/ORSA Bulletin for the Atlanta Meeting, November 1977.
- “Measurement Issues in Portfolio Analysis,” with Vijay Mahajan, in R.P. Leone, (ed.), *Proceedings of Market Measurement and Analysis*, TIMS, 1980, pp. 50-53.
- “Aimagery Products: A Measurement Challenge,” with Lew Pringle, in J. Keon, (ed.), *Market Measurement and Analysis*, TIMS/ORSA, 1981.
- “Standardized Portfolio Models: An Empirical Comparison of Business Classification,” with Vijay Mahajan and Donald J. Swire in Allan D. Shocker and R. Srivastava, (eds.), *Proceedings of the 1981 Analytical Approaches to Product and Marketing Planning Conference*.

## **XII. CASE STUDIES**

- During the academic year 1962-1963, I wrote a number of marketing cases at the Hebrew University, Jerusalem (Israel). One of these cases, The Ozi Ballpoint Pen III, was published in Harper W. Boyd, Jr. et al., (eds.), *Marketing Management: Cases from the Emerging Countries* (Reading, MA: Addison-Wesley Publishing Company), 1966.
- During the academic year 1968-1969, several marketing cases were written under my supervision at the Leon Recanati Graduate School of Business Administration, Tel Aviv University.

### 3. CONSULTING EXPERIENCE

#### I. Marketing, Business Strategy, and Marketing Research Consulting

##### 1. Information and Telecommunication Industry

- 
- Telenet, Strategies for “Getting More with Less” (2006)
- Samsung, Management of Technological Innovation (2006)
- Next Level Communication: Business strategy consulting (2000)
- Motorola Broadband Sector: 1998-2004. Business Strategy consulting
- Northern Telecom: Value Pricing and Business Strategy Consulting (1993-1995)
- IBM:
  - ABS Division: Developing procedure for Integrating Marketing and R&D (1988-1989)
  - ES Division, Marketing Strategy and Segmentation (1991-1993)
- AT&T & the Bell companies: Occasional consultant to various units, including:
  - AT&T Technologies Inc. – Design a market segmentation program (1986)
  - AT&T – Review and Design of Portfolio System (1981-1982)
  - Bell Atlantic – Marketing & pricing strategy (1983)
  - Bell Canada – Design of a segmentation study and product portfolio (1979-1980)
- Xerox: Marketing consulting to a design integration program (coordinated by Jay Doblin Associates) and design of a market segmentation project (1982-1983)
- Geometric Data: Segmentation/positioning studies (1981-1982)
- Newsweek, Inc.: Marketing consulting (1979-1980)
- RCA, Government Communications Systems: Design of a research program to assess the market response to new Electronic Mail System (1978-1979)

##### 2. Financial Services

- SEI: Marketing, Business and Corporate Strategy consulting (1986 to present)
- 
- Edward Jones & Co.: Marketing and Business Strategy consulting (1984-2004)
- CitiBank: Statistical consulting (1980); marketing strategy consulting (1996-1997)
- E. F. Hutton: Design and implementation of a marketing planning system and various marketing research projects (1979-1984)
- Reliance Insurance Companies: Marketing research consulting (1980-1981)
- Colonial Penn Group: Design and evaluation of most of the firm’s research activities and general consulting to marketing and top management (1973-1980)
- Chase Manhattan Bank: Process for evaluation of mergers and acquisitions and design of segmentation studies (1978-1979)

##### 3. Health Care

- ConvaTec: Marketing Driven Business Strategy (2008)
- Bristol-Myers Squibb (BMS): Marketing strategy consulting (1997-2002)
- Sterling Drug, Inc.: Development of marketing driven portfolio of R&D projects (1986-1991); Pricing study for innovative new product (1991-1992)
- 
- Merck, Sharp, and Dome: General marketing research consulting (1981)
- Merck & Co.: Marketing Strategy and Marketing Research and Modeling (1991-1996)
- Pfizer, Inc.: 1975-1990. Design and analysis of most of the marketing research projects of Pfizer Laboratories and Roerig. Occasional marketing strategy consultant to the Hospital Products Group (1984-1986) and Pfizer Pharmaceuticals (1987-1990).
- SmithKline Beckman: Marketing strategy development for TAGAMET (1987-1988); evaluation of strategy implementation (1989)

- SmithKline Clinical Laboratories: Marketing planning (1984)
- Upjohn: Strategic planning consulting (1981)
- West Jersey Health System: Marketing and Business Strategy (1985)

#### 4. Transportation

- Air Canada: Market segmentation, positioning and new product development (1973)
- Chrysler: Modeling the advertising budget (1978), advising regarding the analysis of customer satisfaction process (1995-1997)
- Conrail: Design of a positioning/segmentation study (1978-1979)

#### 5. Consumer Goods

- Mars, Advisor to the Catalyst Group (2010 – present)
- 
- DAYMON: Marketing Strategy (2003-05)
- American Dairy Brands and Schreiber Foods, Inc.: Arbitration (2004)
- Campbell Soup: Advertising Strategy, 91-96, 2005-07; Taste Tests (2001-2003)
- Coors Brewing Company, Pricing and positioning (2001)
- Eastman Kodak: New product research approaches (1978)
- R.J. Reynolds Tobacco Co.: Evaluation and design of a new product development system (1979-1980)
- S.B. Thomas: Marketing and research consultant (1979-1980)
- Simplicity Patterns, Inc.: Develop a business plan (1982)
- Pepsi: Research support for the Pepsi Challenge and related campaigns (1978, 1981, 1990, 1995, 1999)

#### 6. Industrial Products and Services

- ITT Water Technology Group (2004-2005)
- John Fluke Manufacturing Co., Inc.): Marketing and corporate strategy (1985-1988)
- Exxon Chemicals: Marketing and Business Strategy (1985-1986)
- International Harvester: Designing a market segmentation process (1980)
- Stauffer Chemicals: General marketing consulting (1980)
- Exxon Chemicals: Marketing and Business Strategy (1985-1986)

#### 7. Retailing

- Wickes, plc: U.K. Marketing and Business Strategy Consulting (1988-1996)
- Sears Roebuck & Company: Advertising and marketing strategy (1972-1973)

#### 8. Professional Service Firms

- MS&L: Marketing consulting (1995-1997; 2001-2002)
- Price-Waterhouse Coopers LLP (marketing and corporate strategy consulting, 1996-2001).
- Standard & Poors (1997-2000)
- IMS America (1997)
- Medicus (1989-1997)
- Hakuhodo. Marketing Strategy for the 21<sup>st</sup> Century (1992-1995)
- Morgan, Lewis & Bockius: Development of Business Strategy (1992-1994)
- DMB&B (1993)
- Y & R (1989)
- Market Research Corporation of America (MRCA) (1975-1987)
- BBD&O (on an occasional basis, 1974-1985)
- Doyle Dane Bernbach: Evaluation of a campaign claim (1980)

- Cunningham and Walsh, Inc. (1978)
- Oxtoby-Smith (selected projects, 1972-1978)
- Gahagan Research Associates, Inc. (selected projects, 1972-1978)
- Professional Marketing Research, Inc. (1977-1978)
- Oxtoby-Smith (selected projects, 1972-1978)
- Applied Communication Research (1974-1976)
- National Analysts (1975-1976)
- Robinson Associates (1969-1975)
- Robinson Associates (1969-1975)
- McConnel Advertising (Montreal), (1974)
- Whittlesey and Partners (1972-1973)

9.Trading Companies, Real Estate Development

- Li & Fung: Business Strategy consulting (1998 to present)
- 
- Dewey Companies: Marketing and Business Strategy consulting (2003)

**II. Directorship**

- IDT (2005-2008)
- Ecquaria (2001-04)
- Enhance Financial Services (1997 until acquisition by Radian Group, Inc. in 2001)
- Credit 2B (2001)
- CASA – Center for Adaptive Systems Applications Inc. (1999 Until acquisition by HNC in 2000)
- Access Technologies Group, co-founder and chairman (1992-1996)
- Contel Corporation, member of the Board of Directors (1988 Until acquisition by GTE in 1991)
- Reality Technologies, Inc. (1988-until acquisition by SEI Investments in 1990)
- Dover Regional Bank Shares, member of Board of Trustees (1986-1990)
- Shooting Stars, Inc., member of the Board of Directors (1986-1990)
- The Cortlandt Group, Inc., Co-founder and Chairman of the Board of Directors, (1979-1986)

**III. Illustrative Advisory Boards**

- Decision Lens (2005-present)
- QS World University Rankings (2009-present)
- Fung Retailing Group (2013-present)
- 
- Arshiya (India) (2007-2013)
- Cisco Collaboration Consortium (2009-2011)
- NetXentry (WebForPhone) (2000-2011)
- Mutual Art (2003-2011)
- Ad4ever (2000-2003)

**IV. Expert Witness: Marketing and Marketing Research Consulting in Legal Cases**

- Alschuler, Grossman and Pines: Packard Bell vs. Compaq, 1995-1996
- Arent, Fox, Kitner, Plotkin & Kahn: Marketing research consulting re: Estee Lauder, 1987
- Arnold, White and Dunkee: The Clorox Co. vs. Dow Brands Inc. re: Smart Scrub v. Soft Scrub, 1995
- Arnold & Porter:
  - a) Schering v. Pfizer, Perceived sedation of Zyrtec, 2000
  - b) Pfizer: Physicians' beliefs concerning prescription antihistamine products in terms of their sedating/non-sedating characteristics 2002
- Baker & McKenzie:
  - a) G.D. Searle & Co. and subsidiaries litigation in the U.S. Tax Court, 1982
  - b) American Republic Insurance Co. vs. Americare Inc. and American Dental Centers P.C.,

1988

- Berle, Kass and Case: Evaluation of public attitude re: Burlington County Bridge Commission, 1992
- Bilzin Sumberg Attorneys at Law, Lennar Corporation vs. Michael C. Morgan, 2007
- Bingham McCutchen LLP: Sharp Computer v. Dell Inc., 2010
- Maurice Blackburn Cashman Commercial (Australia), Biota Holdings Limited vs. GlaxoSmithKline re. Relenza, 2007-2008.
- Blanchard, Krasner & French, Consulting Re. Aerus, 2006-2007
- The Calorie Control Council vs. FTC re: the Saccharin case, 1979
- Covington and Burling:
  - a) The Proprietary Association vs. FTC re: over-the-counter (antacids) drugs, 1979
  - b) FTC Staff Report on cigarette advertising investigation 1981-1983 including appearance before congressional committee in hearing on H. R. 1824: "The Comprehensive Smoking Prevention Education Act"
  - c) International Telecharge Inc. vs. AT&T, 1992-1994
  - d) Dream Team Collectibles vs. NBA Properties (re: Dream Team), 1996
  - e) G. A. Modefine S.A. v. Armani.com, 2003-2004
  - f) Defence in Class Action Re: IBM REAP Educational Benefit, 2006-
  - g) Spirits Int Nv vs. S.S. Taris Zeytin Vezeytinyagi Birliei, Re: Moskovskaya, 2006-2008
  - h) Cunningham v. International Business Machines Corp., 2007
  - i) QS Wholesale, Inc., v. World Marketing, Inc., 2013
- Cravath Swain and Moore:
  - a) Amertech Corporation, *et. Al.* v. Lucent Technologies Corporation [Arbitration], 1997
  - b) Louis Vuitton v. Dooney & Bourke, Inc., 2004
- Crude Oil Resellers vs. U.S. Department of Energy Economic Regulatory Administration re: the proposed crude oil reseller price regulations, 1979, including presentation at public hearing
- Darby and Darby. Procter & Gamble vs. Colgate, Palmolive, and Y&R re: China advertising, 1997
- Davis Polk & Wardwell LLP
  - a) P&G and Sanofi-Aventis US vs. Hoffman-La Roche Inc and GlaxoSmithKline, Inc. Re.Boniva, 2007
  - b) Procter & Gamble Pharmaceuticals, Inc., and Sanofi-Aventis US LLC, v. Hoffman-La Roche Inc. and Glaxosmithkline, Inc., 2006
- Dechert Price & Rhoads:
  - a) The Mutual Assurance Co. vs. American Council of Life Insurance and Health Insurance Association of America (re: The Green Tree), 1983-1984
  - b) INC vs. Manhattan, Inc., 1985
  - c) Tunis Brothers Co. vs. Ford Motor Credit Co., 1988
  - d) Allerest vs. Alleract, 1988-1990
  - e) Campbell Soup Co. vs. Conagra, Inc. (Various deceptive advertising cases) 1991-1996
- Department of Justice, Antitrust Division: Consulting in a number of cases since 1996, including Microsoft Network, ski resorts, Echostar's proposed acquisition of DirecTV, and dental supplies
- Dilworth, Paxson, Kalish, Levy and Kauffman: Prince Castle vs. Le-Jo Enterprises, 1977-1978
- Fitzpatrick, Cella, Harper & Scinto:
  - a) The Gap, Inc. and Gap (Apparel) LLC v. G.A.P. Adventures, Inc., 2010
  - b) American Beverage Corporation and Pouch Pac Innovations, LLC v. DiAgeo North America, Inc., and DiAgeo Americas Supply, Inc. t/d/b/a Captain Morgan Co., 2012
- Forrest, Hainline III, American Pasta Co. vs. New World Pasta Co. (re: "America's favorite pasta"), 2002
- Fulbright & Jahorski: Deere and Co. vs. MTD Holdings, 2003
- Gibson, Dunn, & Crutcher:
  - a) Pfizer, Inc. vs. International Rectifier Corp., 1982-1983
  - b) Thompson vs. General Nutrition Corp., 1985
  - c) New Vector vs. Metro Mobile, 1986;1992
  - d) Air Passenger CRS Antitrust Litigation vs. American Airlines, 1987-1990
  - e) Quintons/Mahurkar vs. Shiley
  - f) McCaffrey vs. Pfizer re: Plax, 1990
  - g) The Travel Difference vs. The Time Mirror Co. (LA Times), 1992

- h) Toyota re: class action defense vs. Staples Stillwell on the “destination charge” on Monronery Stickers, 1995-1996; 1999-
- i) Hewlett-Packard vs. Nu-Kote Int. Inc., Anti-trust, 1998-1999
- j) LA Cellular AT&T Wireless class action defense, 2002, 2004-
- k) Hewlett Packard defense vs. Staple Stilwell in class action suit re economy cartridge, 2003
- Gold, Farrel & Marks: Miramax Film Corp. vs. Columbia Pictures Entertainment, re: *I Know What You Did Last Summer* (1997)
- Goodwin Procter LLP:
  - a) FTC vs. New Balance re: “made in USA”, 1995-1996 [FTC Hearing] and consulting, 1998
  - b) Public Media Center and People of the State of California vs. Tri-Union Seafoods, Delmonte Corp & Bumble Bee Seafoods. Re: Proposition 65 Mercury In Tuna, 2006
  - c) Environmental World Watch, Inc. v. The Procter & Gamble Distributing Co., Los Angeles Superior Court No. BC 338895; Council for Education & Research on Toxics v. McDonald’s Corp., et al., Los Angeles Superior Court No. BC 280980; and People of the State of California v. Frito-Lay, et al., Los Angeles Superior Court No. BC 337618, 2007.
- Greenberg Traurig LLP
  - a) Chatham et al v. Sears Roebuk & Co. Re: Craftsman Made in USA, 2007-
  - b) Whirlpool Corp. vs. Sensata Technologies and Texas Instrument, Inc., 2011
  - c) Curt Schlesinger v. Ticketmaster, 2011
  - d) Santamarina , et. al. v. Sears Roebuck & Company, 2012
- Hapgood, Calimafole, Kalil, Blaustein & Judlowe: Merrill Lynch vs. Paine Webber (re. RMA), 1985
- Heller, Ehrman, White, and McAuliffe: Apple Computer Securities Litigation, 1985-1986.
- Herling, Lindeman, Goldstein and Siegal: Roli Boli vs. Pizza Hut, 1997
- Hill, Betts, and Nash: Fender Musical Instruments Inc. vs. E.S.P. Co., 1985
- Howrey, Simon, Arnold & White:
  - a) Sands, Taylor and Wood vs. The Quaker Oats Co. re: Thirst-Aid, 1987
  - b) Syntex, Inc. vs. Schering-Plough Healthcare Products, Inc. re: Femcare, 1992
  - c) Anheuser Busch (re Bud Dry commercials), 1993
  - d) Anheuser Busch vs. Labatt (re: Ice Beer), 1994-1995
  - e) Anheuser Busch vs. Samuel Adams, 1995
  - f) Anheuser Busch vs. United Guinness Distillers (re: Red Label from Budweiser), 2002
  - g) Nissan North America vs. BMW (re: “Z”), 2002
  - h) Consulting Re: Schering Plough, 2007
- IT&T Continental Baking vs. FTC re. Fresh Horizons advertising, 1977-1978
- Jenner & Block:
  - a) General Dynamics vs. AT&T. re: Antitrust litigation, 1987-1990
  - b) AT&T vs. MCI re: Telemarketing Practices 1990
  - c) Recording Industry Association of America, Re: Adjustment of Rates & Terms for Satellite Digital Radio Services (Copyright Royalty Board), 2006-2008
  - d) In Re: Adjustment of Rates and Terms for Preexisting Subscription Services and Satellite Digital Audio Radio Services before the Copyright Royalty Board, 2007
- Kaye, Scholer, Fierman, Hays & Handler:
  - a) Automated Bread Dist. Corp. vs. General Foods Corp. (Re: Freihofer Baking Co.), 1991-1992
  - b) Zone Perfect Nutrition Co. vs. Hershey Foods Co., 2004
- Kenyon & Kenyon:
  - a) Mead Data Control, Inc. vs. Toyota Motor Sales, U.S. re: Lexis vs. Lexus, 1988
  - b) Hiram Walker and Sons vs. White Rock Distilleries re: Kapala-Kahlua
  - c) America Online vs. AT&T Corp. re: ATT&T’s “You Have Mail”, 1999
  - d) Twentieth Century Fox Film vs. Marvel Enterprises, Inc. (re: Mutant X), 2002
  - e) Petition for Cancellation of the Registration of the Gakic Mark, 2006
- Kirkland and Ellis
  - a) Kraft Foods Inc. and Capri Sun vs. Minute Maid, 1997
  - b) Time Inc. vs. Peterson Publishing Co. re: Teen vs. Teen People, 1997-1998
  - c) Brach and Brock vs. James River re: Royals candies, 1998-1999
  - d) Hermes vs. Lederer, re: the Kelly Handbag, 1998-2001
- Kirkpatrick and Lockhart: McPalland et al v. Keystone Health Plan Central, Inc. (re: class



- certification of SeniorBlue Customers, 2001-2002
- Kleinfeld, Kaplan and Becker: re: Iron-Kids Bread Package, 1991
- K&L Gates LLP:
  - a) Quia Corp. v. Mattell Inc. and Fisher-Price Inc., 2010.
  - b) Sara Lee Corporation v. Kraft Foods, Inc. and Kraft Foods Global, Inc., 2011
  - c) Sara Lee Corporation v. Kraft Foods, Inc. and Kraft Foods Global, Inc., 2012
- Kramer Levin LLP: Finjan, Inc. v. McAfee, Inc., Symantec Corp., Webroot Software, Inc., Websense, Inc., and Sophos, Inc., 2012
- Lee, Toomey, and Kent Pfizer Pharmaceuticals vs. the IRS, 1978-1979
- Lempres & Wulfsberg and Kutak, Rock, & Campbell: Evaluation of Expert Reports, re: International Pharmaceutical Products, Inc., 1985-1990
- Liddy, Sullivan, Galway, and Begler:
  - a) Coopervision, Inc. vs. CTL, Inc. (re: Permatint), 1985
  - b) Johnson & Johnson, Inc. vs. Oral-B Laboratories (re: Minute-Gel), 1987
  - c) Soft Sheen's Care Free Curl vs. Revlon's I of Nature (Trademark), 1986-1987.
  - d) Oral-B Laboratories, Inc. vs. Johnson & Johnson, Inc. (re: Reach Advertising), 1986-
- Locke Lord Bissell Liddell: The Gap, Inc. and Gap (Apparel) LLC v. G.A.P. Adventures, Inc., 2009.
- Lowenstein, Sandler: Princeton Economics Group vs. AT&T (re: class action defense of spirit), 1994-1995
- Maurice Blackburn Cashman Pty Ltd: Biota Holdings Ltd and Anor vs. Glaxo Group Ltd. & Ors. Re: Relenza, 2006-
- Mitchell, Silberberg & Knupp: Stella Foods Inc. vs. Cacique IC, re: Rancho, 1997-1999
- Morgan, Lewis and Bockius: Scott paper defense in the Turnabout Marketing Case, 1983
- Morison, Cohen, Siner, and Weinstein, Hertz v. Avis, 1994.
- Morrison & Foerster [and Bingham McCutchen; Arnold & Porter; Goodwin Procter; Greenberg Traurig]
  - a) Prop 65 [Re Acrylanide in Potato Chips and French Fries]: Environment World Watch Inc. v. P&G Distributing Company
  - b) Council for Education and --- on Toxins v. McDonald's Corp
  - c) People of the State of California v. Frito-Lay Inc., 2007-2008.
- Moses & Singer: THOIP (A Chorion Limited Company) v. The Walt Disney Company, 2009-10
- Munger, Tolles and Olson:
  - a) FTC vs. Polygram Holdings et al. re: Three Tenors Case 2001-2002
  - b) Universal vs. MGM (re: Rollerball) 2002
- Odutola Law: Spirits Int. Nv. vs. Distilleries Melville Ltd. Re: Moskovskaya vs. Moskova, 2007-
- Pattishall, McAuliffe, Newbury, Hilliard, & Geraldson:
  - a) S.C. Johnson and Son, Inc. vs. Carter Wallace ("Edge" vs. "Rise"), 1983
  - b) Anheuser Busch vs. Stroh Brewery Co. and vs. Miller and Heillman, (re: LA beer), 1984-1985
  - c) S. C. Johnson & Son Inc., re: L'envie, 1986-1987.
  - d) Shelby Motor vs. Ford, 1988.
  - e) GFA Brands Inc. and Fitness Foods Inc. vs. Canbra Foods Ltd. and Campbell Mithun/Esty, Inc. re Heartlight, 1990-1991.
  - f) AT&T vs. MCI (various deceptive advertising cases) 1991-
  - g) Walt. Disney vs. Good Times, 1993
  - h) Car Freshener Corp. vs. S.C. Johnson and Son, Inc. (re: Glade Plug Ins Air Freshener Design), 1994
  - i) International Telecharge, Inc. vs. AT&T, 1992-1994
  - j) S.C. Johnson and Son, Inc. vs. Avon (re: Skin So Soft) 1996
  - k) GTE Card Services Inc. vs. AT&T, 1996
  - l) SunAmerica Corp. vs. Sun Life Assurance Co. of Canada 1993-1995, 1997-1998 [W.H. Covington and Burling]
  - m) Blue Cross Blue Shield vs. American Medical Association, re: CPT, 1998
  - n) Encyclopedia Britannica, Inc. vs. Britannica Home Fashions, Inc., 1999
  - o) Simon Property Group, L.P. v. mySimon Inc., 2001-
  - p) Montblanc – Simplo GmbH v. Savonnerie et Parfumerie Bernard, 2001
  - q) Old World Industries, Inc. vs. AutoMeter Products, 2002

- r) JLJ Inc. v. Santa's Best Craft (Christmas tree lights), 2004
- s) Energy Brands Inc. (Glaceau) vs. Pespico Inc. + South Beach Beverage Co., Inc Re: Sobe Life Water, 2006
- t) Auto Meter Products Inc. v. Maxima Technologies & Systems LLC, 2007
- u) Dyson, Inc. v. BISSELL Homecare, Inc., 2012
- v) Select Comfort Corp. vs. The Sleep Better Store (2013)
- Paul, Weiss, Rifkin, Wheaton and Grasser:
  - a) Revlon vs. L'OREAL re: Colour Endure Commercials 1995
  - b) Revlon vs. Cover Girl self-renewing lipstick advertising, 1996 [NAD]
  - c) Castrol vs. Penzoil (re comparative advantage) 2008.
- Pepper, Hamilton and Scheetz:
  - a) Del Monte Corp. vs. Sunkist Growers, Inc. Arbitration, 1990-1991
  - b) Sun Oil Company defense against class action certification, 1996-1997
- Pennie & Edmonds IT&T Continental Baking (C&C Cola): defense against Coca Cola re: C&C Cola, 1978
- Pillsbury, Madison & Sutro: Consulting re:
  - a) Thrifty Rent-A-Car vs. Elder, 1991-1992
  - b) Green Giant American Mixtures, 1994
  - c) Chrysler Corp. vs. Replacement Sheet Metalparts Distributors, 1992-1993
- Pillsbury Winthrop LLP
  - a) Mulligan v. Pacific Bell Telephone Co. (inside wiring), 2004
  - b) State of California vs. Tri-Union Seafoods, et al. (Canned Tuna, Proposition 65)
- Quinn Emanuel:
  - a) Louis Vuitton Malletier, S.A. v. Hyundai Motor American, 2011
  - b) Moldex-Metric, Inc. v. McKeon Products, Inc., 2012
  - c) Apple, Inc. vs. Samsung Electronics Co. Ltd., 2012
- Rogers and Wells [and the Italian Trade Commission], re: Italian pasta dumping case, 1996
- Sidley and Austin:
  - a) Industrial Gas litigation, 1986
  - b) Land O'Lakes, Inc. vs. Bakers Franchise Ltd., 1987
  - c) Ultramar, Inc. vs. CITGO Petroleum Corporation, 1997
  - d) AT&T vs. US West Communications, re: US West advertising, 1998
- Sills, Cummis, Zuckerman, Radin, Tischman, Epstein and Gross: E.R. Squibb and Sons, Inc. vs. Stuart Pharmaceuticals, 1991.
- Skadden, Arps, Meagher, & Flom:
  - a) American Home Products vs. Beecham re: Delicare commercials, 1986
  - b) Tambrands, Inc. vs. Warner-Lambert Co. re: EPT commercials, 1986-1987
  - c) Beecham Inc. vs. Yankelovich, Clancy, Shulman and Saatchi & Saatchi Holdings, Inc., re: projections for Delicare, 1986-1988
  - d) American Express vs. MasterCard re: Goldcard, 1988
  - e) Challenge to the networks by Sterling Drug re: Bristol Myers Tribuffered Bufferin commercials, 1988
  - f) Challenge by Dow Brands, Inc. of the TV advertisement for Reynolds Metals Company's "SURE-SEAL" food storage bags, 1989
  - g) Anheuser-Busch Company vs. Coors Brewing Company (various deceptive advertising cases) 1991-1993
  - h) R.H. Donnelley vs. Sprint Publishing and Adv. Inc., re: Sprint Yellow Pages, 1996
  - i) Anheuser Busch vs. Boston Beer re: A-B advertising [NAD], 1997
- Spirits International BV: N.V. vs. S.S. Taris Zeytin, Opposition No. 91163779 before the Trademark Trial and Appeal Board, 2006
- Steptoe & Johnson LLP: DirectTV Inc. and EchoStar Satellite LLC v. William W. Wilkins, Tax Commissioner of Ohio 2006-2007
- Sullivan & Cromwell: Remington Rand Corp. vs. Amsterdam-Rotterdam Bank N.V., 1991
- Van Hagey & Bogan, Ltd.: Consulting re: The Quaker Oats Co, 1991
- Vinson & Elkins LLP: Wal-Mart Stores, Inc. v. GFA Brands, Inc., 2009.
- Weil, Gotshal and Manges:
  - a) Johnson & Johnson vs. SmithKline Beecham, Re: Tums Advertising, 1991

- b) Schering-Plough Healthcare Products vs. Johnson and Johnson, Inc. re: Neutrogena Chemical-Free Sun Block, 1996
- c) Pharmacia Corp. vs. Glaxosmith Kline Consumer Healthcare (re: NicoDerm advertising), 2002-2003
- d) Priceline.com re: NAD, 2003
- White & Case:
  - a) Trovan Ltd. and Electronic Identification Devices vs. Pfizer Inc. re: Trovan's trademark, 1999
  - b) Frederick E. Bouchat vs. Baltimore Ravens, Inc. and NFL Properties Inc., (re: the Ravens Logo), 2001-2002
  - c) Oakland Raiders vs. TBB and NFL, 2003 [with Bingham McCutchen]
- Whiteman, Breed, Abbott & Morgan:
  - a) Pepsi Cola Company: Defense against Coca Cola Co. re: The Pepsi Challenge, 1978; 1981; 1995 [Mostly with the NAD]
  - b) Burger King Comparative Advertising Campaigns vs. McDonald's and Wendy's, 1982-1990
- Winston & Strawn, LLP
  - a) Verizon Directories Corp. vs. Yellow Book USA, Inc., 2004
  - b) Merix Pharmaceuticals vs. GlaxoSmithKline, Re: Releev, 2006
  - c) Dyson Technology Ltd. vs. Maytag Corp., 2006-2007
  - d) Procter & Gamble Co. vs. Ultero Inc. 2007
  - e) Dyson Technology Limited v. Hoover, Inc. and Maytag Corp., 2007
  - f) GlaxoSmithKline Consumer Healthcare LP v. Merix Pharmaceutical Corp, 2007
  - g) Doctor's Associates Inc. vs. QIP Holders LLC & iFilm Corp.: Subway vs. Quiznos, 2008
  - h) LG Electronics USA, Inc. v. Whirlpool Corp., 2009.
  - i) The Scotts Company LLC v. Central Garden & Pet Company and Gulfstream Home & Garden, Inc., 2009.
  - j) Dyson, Inc., v. Oreck Corporation, Oreck Holdings, LLC, Oreck Direct, LLC, Oreck Merchandising, LLC, Oreck Sales, LLC, Oreck Homecare, LLC, and Oreck@Home, LLC 2009.
  - k) LG Electronics USA Inc. v. Whirlpool Corporation, 2010.

#### **V. Illustrative Marketing Research Clients:**

1. Air Canada (1973\*)
2. American Cyanamid (1972-1973)\*
3. Atlantic Richfield Company (1971-1972)\*
4. Bankers Trust Company (1973-1974)\*
5. BBD&O (1974-1982)
6. Bell Telephone Company of Pennsylvania (1974;1977)
7. Bissell, Inc. (1969-1971)\*
8. Bristol Myers Squibb (1998-2005)
9. Brown & Williamson Tobacco Corp. (1978-1979)
10. Bureau of Newspaper Advertising (1974)\*
11. Campbell Soup Company (1972-1973)\*
12. CBS (1972)
13. Chrysler (via BBD&O) (1975-1978)
14. Clorox Company (1975-1976)
15. Colonial Penn Group, Inc. (1973-1979)
16. Commercial Union Assurance Companies (1974-1975)
17. Connecticut Bank and Trust Company (1972)\*
18. Downe Publishing, Inc. (1972-1973)
19. Eastman Kodak Company (1973)\*
20. Edward D. Jones (1985-1987)
21. E.F. Hutton (1981-1984)
22. First Pennsylvania Banking and Trust Company (1971-1972; 1974-1975)\*
23. General Electric (via BBD&O 1977) (1982)
24. General Foods Corporation: the Jell-O and Kool-Aid divisions and various departments of the corporate product development division (1969-1972)\*
25. Geometric Data (1981)

26. International Air Transport Association (1973-1975)\*
27. International Harvester Company (1975)
28. International Harvester Credit Corporation (1973-1974)\*
29. IT&T Continental Baking Company (1972-1978;1982)
30. Lever Brothers Company (1971-1973)\*
31. Marriott Corp. (1982)
32. Modern Medicine (1970)\*
33. MRCA (1975-1987)
34. Pacific Bell (1981-1982)
35. Pepsi Cola (1981)
36. Pfizer Pharmaceuticals, Inc. (1975-1990)
37. Pillsbury (1975)
38. Pioneer Electronics of America (1978)
39. RCA Computer Division (1972)\*
40. Sears Roebuck & Company (1972-1973)\*
41. SEI Investments (1988-present )
42. Singer (1973)
43. SmithKline and French (1971)\*
44. Snelling and Snelling, Inc. (1973-1974)
45. Sterling Drugs (1985-1986; 1990-1992)
46. Stroh Brewery Company (1970)\*
47. Sun Oil Company (1972)\*
48. Syntex Laboratories, Inc., (1976-1977)
49. The Wool Bureau, Inc. (1975)
50. Twentieth Century Fox (via the Data Group, Inc.) (1972)
51. UNICOM (1973)
52. U.S. Dept. of Commerce, Office of Telecommunications (1972)
53. Western Airlines (via BBD&O) (1979)

The research projects designed and conducted for these firms covered variety of consumer and industrial marketing problems including product positioning and market segmentation, new product development, generation and evaluation of new products, and promotional concepts. Projects with \* were conducted via Robinson Associates.

#### **VI. Illustrative Marketing Research Program Evaluation and Redesign:**

1. Bristol Meyer Squibb: Redesign of the Marketing Research function and various research and modeling procedures (1999-2002)
2. Brown and Williamson: copy and concept testing (1978-1979)
3. Colonial Penn: all aspects of research (1973-1980)
4. IT&T Continental Baking: copy and concept testing, segmentation studies (1972-1978)
5. Pfizer Pharmaceuticals: image studies, new product selection models, etc. (1975-1990)
6. R.J. Reynolds Tobacco: new product development system (1979-1980)

#### **VII. Illustrative Intra-Company Marketing Strategy (and Marketing Research) Workshops:**

Estee Lauder (2012 to present)  
SEI Corporation (1990 to present)

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1. American Medical International (1978)
2. Amoco Fabrics Co. (1984; 1988)
3. ARA (1983)
4. Asociacion Mexicana de Ejecutivos en Planeacion (1979)
5. AT&T (1972-1978)
6. Atlantic Richfield Company (1971)
7. Bank of East Asia (2005)
8. BBD&O (1974-1983)

9. Bell Atlantic (1983)
10. Bell Canada (1980)
11. Black and Decker (1981)
12. Bristol Myers Squibb (1998)
13. Campbell Soup (1972)
14. Career Futures, Inc. (1975)
15. Certain-Teed Corporation (1983)
16. Colonial Penn Group (1975-1980)
17. Computer Science Corporation (1975)
18. Contel (1989)
19. Daymon (2004)
20. Deutsche Bank (2004)
21. Di Giorgio Corp (1980-1981)
22. Edward D. Jones & Co. (1983)
23. E.F. Hutton (1979-82)
24. Ethicon, Inc. (1979)
25. General Foods (1970)
26. Gray Advertising, Inc. (1977)
27. IBM – Applied Business Systems (1988)
28. Intermountain Health Care, Inc. (1978)
29. International Harvester (1974-1975)
30. ITT Water Technology Group (2004)
31. Li & Fung (2005)
32. Los Angeles Times (1993)
33. 3M's Marketing Council (1986)
34. Machinist Publishing Co., Ltd., Japan (1977)
35. Miles Laboratories Ltd., Canada (1973)
36. MRCA (1978)
37. New York Telephone Company (1976)
38. Pfizer Pharmaceutical, Inc. (1975-1987)
39. Phillips Petroleum Company (1992-1993)
40. The Pillsbury Company (1976)
41. Rhodia, Brazil (1979)
42. Schlachman Research, U.K. (1975)
43. SmithKline & French (1970)
44. Spectra-Physics (1983)
45. Standard & Poors (1998)
46. Syntex Laboratories, Inc. (1976)
47. Tektronix, Inc. (1978)
48. The Bunge Group (1982) Spectra-Physics (1983)
49. The Clorox Company (1975)
50. The Executive Forum (1979)
51. Unilever, U.K. (1975)
52. Union Mutual (1981)
53. Wyeth International Ltd. (1980)
54. Xerox (1981)

#### **VIII. Selected International Consulting**

Li & Fung, Hong Kong: Business Strategy (1998 to present)

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1. UNIG, Singapore, Business Strategy (2000)
2. Hakuhodo, Japan: Design of a 21<sup>st</sup> Century Advertising Agency (1993-1997)
3. Wickes, plc., UK: Marketing and business consulting (1988-1996)
4. McKinsey, Milan: New Developments in Marketing Strategy, Research, and Modeling (1988)
5. Bunge Group, Brazil: Marketing planning (1982-1986)
6. Meridian Group U.K.: Marketing and Business Strategy (1985-1986)
7. Sunstar, Japan: Marketing and Business Strategy (1985)

8. P.E. Consulting Group, South Africa: Strategic planning & Marketing Consulting and Conducting Executive Seminars (1982)
9. Bell Canada, Canada: Market Segmentation Study (1979-1981)
10. Cooperative de Seguros de Vida, Puerto Rico: Design of a marketing planning system (1980)
11. Discount Bank, Israel: Marketing planning (1980)
12. Bank Leumi Ltd., Israel: Marketing planning (1978)
13. Fuji electric, Japan: Design of a management planning process (1977)
14. Koor Industries, Israel: Designing and organizing the marketing function for the corporation's 34 companies (1968-1969)

#### **IX. Consulting to Government Agencies**

1. FinCen/BENS project on Terrorist Financing, 2003-2004
2. U.S. AIR FORCE: Evaluation of the Air Force resource allocation procedure (1980-1981)
3. CANADIAN GOVERNMENT: Industry, Trade & Commerce Design and execution of a study for evaluation of the U.S. market potential for selected Canadian medical diagnostic and therapeutic products (1980-1981)
4. U.S. PATENT AND TRADEMARK OFFICE: Designing a strategic planning system (1981)
5. NASA: Evaluation of NASA's IAC's 1976 advertising campaign and recommendations for its future advertising and marketing strategy (1977)
6. ISRAEL DEFENSE MINISTRY: Analyze and evaluate the marketing system of the Administered Areas (Arab territory prior to the 6-Day War). The findings and recommendations of this study were submitted in classified report to the Israeli Defense Ministry (1968-1969)

#### **X. Consulting/Advising to Research Organizations**

1. Member of the advisory committee of the Diebold Institute study of the impact of public policy on entrepreneurial startup companies: the U.K. and U.S. in biotech and IT, (1998 -2000)
2. Institute of Business and Economic Research, University of California, Berkeley. Consultant on the Coping Behavior (an empirical study of the consumer-technology interface) project, sponsored by the National R&D Assessment Program, NSF. (1976-1981)
3. Pennsylvania Science and Engineering Foundation, Temple University/Applied Communication Research, Inc. Research consultant for design, analysis, and evaluation of an NSF (Office of Science Information Services) sponsored project concerning the design and evaluation of experiments for the marketing of scientific and technical information services. (1974-1977)
4. EDUCOM: Inter-university Communications Council, Inc. Participant in an interdisciplinary seminar to identify and measure special interest audiences for public television. (1974)
5. The John and Mary R. Markle Foundation.
6. Participated in a workshop for design of "Quality Ratings of TV Programs." (1979)
7. Participated in the design of a study on special interest audiences. (1975)
8. Marketing Science Institute Consultant from February 1967 to December 1968. Conduct and plan research projects primarily in the areas of industrial buying behavior, advertising, and international marketing.
9. Marketing Science Institute U.S. Department of Agriculture Study Group on Marketing Performance Principle investigator, March-December 1968. Developed a model for the evaluation of the performance of the U.S. marketing system.
10. Management Science Center University of Pennsylvania Senior staff member September 1967 to July 1968. Engaged in the development of a marketing model for Anheuser-Busch.

## 4. UNIVERSITY ACTIVITIES

### I.University of Pennsylvania, The Wharton School

#### A. Program Development

##### 1. The Wharton Fellows

Master classes designed and directed included:

- November 27-December 12, 2000: Philadelphia: Transformation Leadership
- January 7-January 12, 2001: Silicon Valley: Transformation Leadership
- February 18-February 24, 2001: Barcelona: Transformation Leadership
- March 15-March 17, 2001: Philadelphia: Transformation Leadership
- May 6-May 12, 2001: Philadelphia, Wharton: Transformation Leadership
- June 3-June 9, 2001: Barcelona/Helsinki: Transformation Leadership
- July 8-July 14, 2001: Silicon Valley: Transformation Leadership
- March 17-March 22, 2002: CEO Forum: Transformation Leadership
- April 21-April 25, 2002: Silicon Valley/San Francisco: Transformation Leadership
- June 9-June 11, 2002; Munich
- November 3-November 8, 2002: Foundations I: Philadelphia
- January 5-January 9, 2003: Foundations II: San Francisco: Transformation Leadership
- September 7-September 9, 2003: Top Line Growth in Turbulent Times: Philadelphia
- January 7-January 9, 2004: Success: What's Next?: Seattle
- April 25-April 28, 2004: Milken & the Media: Los Angeles
- June 1-June 8, 2004: Leveraging Japan: Tokyo; China: Transformation from the Inside: Shanghai
- November 12-November 14, 2004: Toward a New Europe: Prague, Czech Republic
- December 12-December 14, 2004: Merger, Acquisition and Renewal: New York
- March 6-March 9, 2005: Market & Sourcing Opportunities in India: Mumbai & Bangalore, India
- June 26-June 28, 2005: Working with Government, Washington D.C.
- November 22-November 27, 2005: Design, Innovation and Strategy: Copenhagen, Denmark/Milan, Italy
- December 4-December 6, 2005: Opportunities in Latin America and the US Hispanic Markets: Miami
- March 5-March 7: What's Next? Silicon Valley
- June 4-June 6: Islam and the West: Istanbul
- February 25-February 27, 2007: Managing in an Evolving World, Philadelphia
- May 21-May 23, 2007: Globalization Revisited, Shanghai
- October 14-October 16, 2007: The Next Big Thing, Silicon Valley
- January 9-11, 2008: Innovation, Customer Insights and Creative Growth Strategies, with David Reibstein, Las Vegas.
- April 6-8, 2008: Creativity and Innovation, with Karl Ulrich, Philadelphia.
- October 11-15, 2008: Islam and the West: Insights and Opportunities, with Bulent Gultekin, Dubai.
- May 17-19, 2009: Philadelphia: Finding Opportunity in Times of Economic Crisis
- October 25-27, 2009 Washington DC: Opportunities in Times of Crisis: The Changing Relationship between Business and Government
- June 6-10, 2010: China: Insights and Opportunities, Shanghai, China.
- October 8-12, 2010 Israel: The Holy Land of Innovation and Entrepreneurship
- May 2-4: Lessons for profitable growth: New York
- February 20-22, 2011 Philadelphia: What's Next in Management Disciplines and Business Transformation?
- October 9-11, 2011 Buenos Aires: Argentina: Insights and Opportunities
- October 13-15, 2011 São Paulo: Brazil: Insights and Opportunities
- October 14-17, 2012 Philadelphia, PA: Innovation and Growth
- July 14-17, 2013 Silicon Valley, CA: The Next Big Thing

2. The MBA X-Functional Integration Initiative (2003-2005)
3. A number of Executive Development Programs including :
  - Winning in the Next Millennium: Strategies for Driving Change: Initiator and Director, December 1998.
  - Wharton on the New Reality of Business: Co-Academic Director with Bob Mittlestaedt, December 2001.
  - IDC's MBA @ Wharton Program, 2003-2004; October 2007, 2008, 2009, 2010 (co-director with Ziv Katalan); 2011-2012 (co-director Jehoshua Eliashberg)
  - IESE / CEIBS Global CEO Program: A Transformational Journey (co-director David Heckman), 2012 and 2013
  - LinKS @Wharton, 2007, 2008, 2009, 2010, 2011, 2012 and 2013
4. The e-Curriculum R&D Initiatives. Initiator/Chair of the Committee that designed the new program platform and the e-Curriculum R&D Initiatives (1999-2000) and continued direction and reinvention of the program.
5. The Advanced Management Program (AMP) Design Team (1998).
6. Wharton's Information Management Initiatives (1998-1999). Founder and co-chair (with Paul Kleindorfer) of its faculty council.
7. The Revised MBA Curriculum (1990-1991). Chaired the committee that developed the new curriculum.
8. The SEI Center for Advanced Studies in Management, founding Director. Develop and direct all Center activities and chair its faculty council, 1988-.
9. The Joseph H. Lauder Institute of Management and International Studies, founding Director and chairman of its faculty council. Designed and directed all the Institute's programs, including the establishment of the Institute MBA/MA program which admitted its first class of 50 students in May 1984, February 1983-July 1988.
10. Wharton International Forum. Initiated and designed the original program and chairman of its faculty council, 1987-1998.
11. Wharton Ph.D. with M.A. in International Studies. Initiated the joint program, 1988.
12. Wharton Center for International Management Studies (renamed as the Wurster Center, 1988) founding director. Designed/directed all the Center's activities aimed at the stimulation of international research at Wharton and the internationalization of the faculty and programs, 1980-1983.
13. The Wharton/SIA (Security Industry Association) Marketing Program. Initiated and designed the program which held sessions on April 1982 and November 1982.
14. The Wharton Recanati Multinational Marketing and Management Program, Co-founder, 1978.
15. The Wharton Executive MBA (WEMBA) program, chaired the committee that developed the program, 1974.
16. Marketing Programs, participated in the redesign of the marketing MBA programs, 1970; Ph.D. 1971; and Undergraduate, 1973 and 1981; including the initiation of The Wharton Dual MBA Major in Marketing/Multinational Enterprise.

## **B. Courses Developed and Taught**

- a. Developed (courses developed by me are indicated by an \*), modified and taught courses and seminars in:

- Advertising Management (MBA)
- Channel Management (MBA)
- Communication Processes in Marketing\* (MBA)
- Consumer Behavior\* (MBA and Ph.D.)
- Creating an e-Business (MBA)\*[A binational e-course to Wharton and IDC students]
- Creativity\* (MBA)
- Health Care Marketing\* (MBA)
- Industrial Marketing\* (MBA)
- Integrating Marketing and Operations\* (MBA) [developed jointly with P. Kleindorfer]
- Interactive Marketing in the Age of the Empowered Consumer (MBA)\*
- International Marketing\* (MBA)



Marketing Management (MBA)  
 Marketing Methods and Applications for Business Consulting\* (MBA) [with P. Green]  
 Marketing Research (MBA and Evening School)  
 Marketing Strategy (WEMBA\*, MBA)  
 Multinational Management  
 Necessity and Experimentation: Lessons from Israeli Innovation: Global Modular Courses  
 Planning Marketing Strategy Projects (MBA)  
 Product Policy\* (MBA)  
 Promotion Policy (MBA)  
 Research Seminar (MBA and Undergraduate)

- b. Course head: MBA advanced study project (1967-1968, 1974-1979), Marketing Management for non-majors (1967-1968, 1970-1971), the MBA Core Marketing Management Course (1970-1971, 1971-1972), Marketing Strategy Seminar (1974-1975)
- c. Guest lecturer in various departments of the Wharton School including the Multinational Enterprise Unit, the Leonard Davis Institute of Health Economics, the Management Department, Management of the Arts Program, Decision Science, Public Policy and Management.

### C. Executive Education Programs at the University of Pennsylvania – Illustrative Sessions

#### 1) Creativity and Innovation

- “Creativity,” Advanced Management Program, June 26, 2013.
- “Creating a Creative Organization,” Master Class Wharton Alumni Forum, Tokyo, May 25, 2013
- “Lessons from Art and the Secrets of Creativity,” Global CEO Program: A Transformational Journey, March 14, 2013
- Enhancing Your Personal Creativity and Challenging your Mental Models,” Comcast Women in Leadership, February 21, 2013
- 
- “Creativity,” AMP, June 27, October 29, 2012
- “Lessons from Art and Guidelines for Creating a Creative Organization,” Aresty IESE/CEIBS Global CEO Program, March 23, 2012.
- “Israel Innovation for Global Social Impact: Accomplishments and Opportunities,” Wharton Global Webinar, February 3, 2012.
- 
- “The Challenge of Creativity,” AMP, June 20, 2011.
- 
- “Creative Thinking and Action,” and “Competing in a Flat World in a Time of Crisis,” FirstCaribbean Leadership Programme, December 8, 2008.
- “Creative Thinking and Action,” Toyota Executive Development Program, July 21, 2008
- “Creative Thinking and Action,” (3 Sessions) Toyota Executive Development Program, July 21, 2008.
- “The Innovation Challenge,” (2 Sessions) Raytheon Executive Leadership Development Program, June 9, 2008..
- “Wharton Fellows Philadelphia Master Class: Innovation and Creativity,” Wharton Fellows, April 6, 2008.
- 
- “Creative Thinking and Action,” FirstCaribbean Leadership Programme, November 19, 2007.
- “Innovative Approaches to the Design of Strategy,” LinKS @ Wharton, November 11, 2007.
- “Creative Thinking and Action,” Toyota Executive Development Program, September 17, 2007.
- “Innovation Strategies for Profitable Growth,” Wharton Fellows Philadelphia Master Class *Managing in an Evolving World*, February 27, 2007.
- 
- “Advances in Innovation Management and New Product Innovation,” LINKS @ Wharton, August 26, 2006.
- “Advances in Innovation Management and New Product Innovation,” Quad-C Executive Session, July 10, 2006.

- "Creativity – A Must for Marketing Success," back-to-class session at the 2005 Wharton Marketing Conference, October 28, 2005.
- "Enhancing Creativity and Innovation," The Wharton e-Fellows I Program, March 2001.
- "Creativity and Innovation," in Wharton Workshop on Creativity and Knowledge Creation, April 1999.
- "Innovation and New Product and Business Development," CEO Circle, May 10, 1996.

## 2) Challenging your Mental Models

- "Mental Models: Power of Impossible Thinking," Global Leadership Fellows Program, July 8, 2013.
- "Challenging the Mental Models of Advertising and Marketing," Google Marketing Academy Module 2, June 6, 2013.
- "Challenging Your Mental Models," Global CEO Program, March 11, 2013
- "Challenging Your Mental Models," , " LinKS NEXT in Line Module 2: Achieving Global Lead & Global Projects- Listen Louder, January 31, 2013
- "Challenging and Changing your Mental Models," IDC@Wharton W12, October 19, 2012
- "Challenging Your Mental Models of Innovation and Growth," Wharton Fellows Philadelphia Master Class, October 15, 2012
- "Challenging your Mental Models," Links: Winning the Right to Serve, September 20, 2012
- "Challenging Your Mental Models," Cheil Worldwide Global Marketing Program, August 20, 2012
- "Mental Models: The Power of Impossible Thinking," Global Leadership Fellows Program World Economic Forum, July, 11, 2012
- "Challenging Your Mental Models," LinKS Next in Line Program, June 22, 2012.
- "Challenging Your Mental Models," Estee Lauder Companies, William P. Lauder Brand Equity & Business Symposium, May 1, 2012.
- "Challenging Your Mental Models," IESE/CEIBS Global CEO Program, March 19, 2012.
- "Challenging Your Mental Models," Estee Lauder Companies Finance Forum, March, 5, 2012.
- "Lesson From Art & Challenging Your Mental Models," Daimler Advanced Executive Program For Vice Presidents, December 6, 2011.
- "Challenging Your Mental Models," LinKS Next in Line @ Wharton, November 10, 2011.
- "Challenging your Mental Models," IDC @ Wharton, September 19, 2011.
- "Challenging Your Mental Models," LinKS@Wharton WWI, September 15, 2011.
- "Challenging your Mental Models," WEF Wharton Global Leadership Fellows Program: Personal Power and Influence, July 13, 2011.
- "Challenging Your Mental Models: The What, Why, How and Beyond," IBM Wharton Executive Forum, July 11, 2011.
- "Challenging your Mental Models," Wharton & Citi Asia: Leadership Program, June 21, 2011.
- "Challenging Your Mental Models," PMA BP CFO Executive Module 3, May 9, 2011.
- "Challenging Your Mental Models, Tyco Electronics Leadership Development Program, February 28, 2011.
- "Challenging Your Mental Models", Tyco Electronics Leadership at Wharton, November 16, 2010.
- "Challenging Your Mental Models", IDC at Wharton, October 18, 2010
- "Challenging your Mental Models," 10th LinKS Wharton Program, June 9, 2010.
- "Challenging your Mental Models," LA CEO Global Program, May 6, 2010.
- "Challenging your Mental Models," Tyco, February 4, 2010.
- "Challenging your Mental Models," IDC/CEIBS@Wharton, October 15, 2009.
- "Challenging Your Mental Models," LinKS@Wharton, June 10, 2009.
- "New Mental Models for Capitalizing on Opportunities in Times of Crisis," LinKS@Wharton, June 10, 2009.

- “Challenging Your Mental Models,” Latin America CEO Program, April 27, 2009.
- 
- “Challenging Your Mental Models,” ConvaTec, December 16, 2008.
- “Challenging Your Mental Models,” ConvaTec, November 12, 2008.
- “Challenging Your Mental Models,” linKS @ Wharton, October 27, 2008.
- “Islam and the West: Challenging Your Mental Models,” Wharton Fellows Dubai Master Class, October 12, 2008.
- “Challenging Your Mental Models,” Wharton Fellows, April 6, 2008.
- “Philadelphia Master Class: The Power of Impossible Thinking,” Wharton Connect, April 3, 2008.
- 
- “Challenging Your Strategic Thinking,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “The Power of Impossible Thinking,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Challenging Your Mental Models,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Challenging Your Mental Models,” LinKS @ Wharton, November 12, 2007.
- “The Power of Impossible Thinking,” Wharton Connect, November 1, 2007.
- “The Power of Impossible Thinking and Global Strategic Management,” CEIBS @ Wharton, June 18, 2007.
- “Challenging Your Mental Models,” Estée Lauder Companies General Management Program, January 28, 2007
- 
- “Challenging Your Mental Models,” Wharton's Business Initiative re: Building Winning Profitable Organization in Professional Team Sports, March 19, 2006.
- “The Power of Impossible Thinking,” Wharton Staff Workshop, September 12, 2006
- “Creative Thinking and Action,” Toyota Executive Development program, September 26, 2006.
- 
- “The Power of Impossible Thinking,” A Wharton Fellows Dinner Event, Kuala Lumpur, March 2005.
- 
- “Growth Strategies and New Mental Models,” Wharton Fellows, August 2003.
- 
- “Capturing Opportunities and Developing New Mental Models,” Wharton on the New Business Reality, December 2001.

### 3) Transformation and Growth

- “Profitable Growth Strategies,” Links: Winning the Right to Serve, September 20, 2012
- 
- “Business Models of the Future,” 10th LinKS Wharton Program, June 9, 2010.
- “Creating a New Business Paradigm,” LA CEO Global Program, May 10, 2010.
- -----
- “Opportunities In Times of Crisis,” Wharton Fellows, May 17, 2009.
- “Opportunities In Times of Crisis and Recession,” Knowledge@Wharton Advisory Board, May 14, 2009.
- “Opportunities In Times of Crisis and Recession,” Knowledge@Wharton Advisory Board, May 14, 2009.
- “Progress, Problems, and Prospects,” Wharton Fellows, May 12, 2009.
- “Creating a New Business Paradigm,” Latin America CEO Program, April 27, 2009.
- 
- “Stretch Objectives, Synthesis and Strategy,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Expand Customers, Value Creation and Diabetic Pathways,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Integrating Strategies and Leveraging Synergies,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “The Evolving World,” LinKS @ Wharton, November 12, 2007.

- “The Evolving World,” Wharton Fellows Philadelphia Master Class, February 27, 2007.
- “Leadership Challenges in the Pharmaceutical Industry,” TEVA Israel *Leading Your Business*, June 28, 2007.
- “A View from the Top: The Perspective of the Enlightened CEO,” Wharton Executive Leadership Program for AICPCU, April 2005.
- Strategy Discussion with Telenet’s Top Management, March 11, 2003.
- “Organizational Change: Problems, Progress, and Prospect,” Price-Waterhouse-Coopers Strategy Master Class, July 26, 2002.
- “Capturing Business Opportunities in a Changing World,” SIA Institute, 50<sup>th</sup> Anniversary Program, March 2002.
- Winning in the Next Millennium, “Driving Change,” 1998.
- Stennis Congressional Fellows Program at Wharton, “Driving Change: Creating Winning 21<sup>st</sup> Century Organizations,” 1997.
- “Management in the 21st Century,” Wharton AMP, September 1989, Philadelphia, PA.

#### 4) Marketing and Branding

- “Global Branding Strategy,” Brand Leadership: Strategies for Driving Growth in a Global Marketplace, June 5, 2013. Philadelphia, Pennsylvania.
- “Towards a New Marketing Paradigm,” IDC@Wharton November 25, 2012
- “Rethinking Your Marketing Strategy,” Aresty IESE/CEIBS Global CEO Program, March 19, 2012.
- “Marketing and Business Strategies in the Age of the Empowered Consumer,” IDC @ Wharton, September 19, 2011.
- “Rethinking Marketing Strategy,” LA CEO Global Program, May 14, 2010.
- “Reinventing Marketing,” IDC/CEIBS@Wharton, October 21, 2009.
- “Opportunities in Reinventing Marketing,” Wharton Fellows, May 18, 2009.
- “Is Marketing Driving Your Business Strategy?,” The Conference Board 2008 Marketing Excellence Conference, November 13, 2008.
- “Destroy Your Brand,” Animas/Lifescan Senior Leadership Strategy Program, December 3, 2007.
- “Market-Driven Organization,” AICPCU and IIA Advanced Executive Education, Wharton, September 10, 2003.
- “Marketing Driven Strategies in a Global Economy,” IBM’s Managing Director’s Executive Development Program, February 13, 2002.
- “The Impact of the e-Bus Revolution on the Marketing Discipline,” Wharton Fellows in e-Business, The Impact on the Discipline, December 2000.
- “World Class Marketing: Implications for Spencer Stuart,” The Wharton/Spencer Stuart Leadership Assessment Program, June 2000.
- “Marketing Strategy in the Global Information Age,” AMP Program, October 1997.
- “Segmentation and Positioning for Sales Force Effectiveness,” Sales Force Management, Wharton Executive Education, March 1997.
- Sales Force Management Program, “Segmentation and Positioning for Sales Force Effectiveness,”

1987, 1990, 1997.

- "Marketing in the Pharmaceutical Industry: Emerging Challenges and Opportunities," Keynote Address, Healthcare Marketing and Communications Council and Wharton Executive Education, Wharton School, April 8, 1996.
- "Marketing 2000," AIMSE/Wharton Investment Institute, January 13, 1995.
- "Pharmaceutical Marketing: Emerging Challenges and Opportunities," Pharmaceutical Advertising Council and Wharton Executive Education Conference on Reengineering Pharmaceutical Marketing, February 25, 1994
- "Marketing Strategy" in the J&J-Wharton Fellows Program in Management for Nurses, 1983, 1984, 1985, 1986.
- AMA International Conference Workshop, Philadelphia, June 1978.
- Marketing Strategy, AMP – Advanced Management Program, 1988-91; 1997-1998.

#### 5) The Network Challenge

- "Network Orchestration," Global CEO Program, March 13, 2013
- "Network Orchestration in a Flat World," LinKS NEXT in Line Module 2: Achieving Global Lead & Global Projects- Listen Louder, January 31, 2013
- Governance and Orchestration in a Flat World," Links: Winning the Right to Serve, September 20, 2012
- "Orchestration in a Flat World," LinKS Next in Line @ Wharton, November 10, 2011.
- "Organizational Networks for Effective Competition in the Flat World, Leadership Development Program at Wharton, February 28, 2011.
- "Organizational Networks for Effective Competition in the Flat World", Tyco Electronics Leadership at Wharton, November 16, 2010.
- "The Network Challenge," SEI Executive Network, June 28, 2010.
- "Business Models of the Future: Orchestrating Alliances," LinKS@Wharton, June 10, 2009.
- "Global Economic Crisis," Latin America CEO Program, April 26, 2009.
- "Competing in a Flat World," Wharton Fellows, February 26, 2008.
- "Network Orchestration," Network-Based Strategies & Competencies Workshop, May 3, 2007.

#### 6) Future of Advertising Program

- "Creating an Agile and Innovative Organization: Lessons from the FoA Program," Strategic Agility & Innovation Workshop, June 17, 2013
- "Facebook Roundtable," Wharton Future of Advertising, January 18, 2013
- "Challenging your Mental Models of Advertising," Havas University Leadership Excellence Program, September 20, 2012
- "The Future of Advertising," Cheil Worldwide Global Marketing Program, August 30, 2012
- "The Future of Advertising," Havas/Euro University Leadership Excellence Program, October 4, 2011.
- "The Future of Advertising," Cheil Worldwide, Global Marketing Program, September 6, 2011.
- "Challenging Your Mental Models of Advertising," Austrian Executive "Future of Advertising" Program, March 7, 2011.
- "Insights from The Wharton Future of Advertising Project" Wharton Fellows at the Conference

Board: Philadelphia Master Class, January 20, 2011.

- “The Future of Advertising”, Havas/Euro University Leadership Excellence Program, October 26, 2010.
- “The Future of Advertising is NOW,” Cheil Communications Project Based Learning in Marketing, August 19, 2008.

#### D. Committee Responsibility:

##### 1. Marketing Department Committees:

- Computer Committee 2009-present.
- Curriculum Committee 2008-2010.
- 5 Year Plan Committee (chair), 2004-2005.
- Initiator and Chair of a Committee to develop a marketing certification program, 2004-2005
- Recruiting/Personnel Committee, since 1971. Chairman Recruiting Committee, 1978-1979; 1981-1983; 1987-1988; Co-chair of the subcommittee for recruiting of STARS 2007- .
- Curriculum Committee, Member of Committee and Chairman of a number of its subcommittees 1967-1978, and 1996-1998. Chairman of the committee 1970-1971, 1973-1975, 1976-1978, and 1980.
- Ph.D. Program Coordinator, 1972-75. Doctoral Committee, 1988-1989.
- External Boards/Affairs Committee, 1987/88; Chair 1988-1989.
- Member and Chairman of various departmental Committees, including all the department’s advisory committees since 1971, Marketing Fund Committee since 1983, and its Long Range Planning Committee, 1970-1971.
- Senior Faculty Recruiting, Chairman 1995-1997

##### 2. Wharton School Committees:

- Founder and Member, Wharton Fellows CEO Global Advisory Board, 2009 to present
- Initiator and developer of *Wharton School Publishing* in conjunction with Pearson/FT, Founding Editor and member of the Faculty Editorial Board (2003-2008)
- Initiator of a faculty group to generate creative curriculum options as input to the MBA Review Committee 2010.
- Dean Advisory Council (since its inception in 1983 to 2000) and 2007/2008; 2008/2009.
- Initiator of a faculty group to generate creative curriculum options as input to the MBA Review Committee 2010.
- Co-Chair, Search Committee for the new Director of the Lauder Institute (2006)
- Member of the Alfred West, Jr. Learning Lab Faculty Committee (2001-2005)
- Chairman, Dean’s Committee on Cross-Functional Integration (2002-2004)
- Member of the Executive Development Faculty Advisory Board (2002-2004)
- Chairman of a Faculty Committee to assure cross program dissemination of e-Curriculum Developments (2000)
- Member of the Strategic Planning Steering Committee, 1999-2000
- Member of the Committee to prepare the strategy for “Management, Leadership, and Organizational Priority” area of the University’s Agenda for Excellence, 1998
- Senior Faculty Committee to Review the Global Presence strategy (Summer 1997)
- Member of the Advisory Committee on Faculty Personnel, 1976-1978; 1984-1985; 1987-1989; 1994-1995.
- Chairman of the Graduate Curriculum Committee focusing on a critical examination of the MBA program and its appropriateness for preparing the leaders of the 21<sup>st</sup> century enterprises. The Committee developed the new MBA curriculum which was tested in 1991/1992 and 1992/1993 and which was fully implemented starting in 1993/1994.
- Initiated and organized the Management Education Council – the vehicle for corporate support

- and funding of the new MBA curriculum, 1992-1993
  - The Wharton International Committee: Chairman, 1978-1981, 1982/1983, 1995-1997. [The 1995-1997 committee developed the Wharton globalization strategy.] Member: 1967-1968, 1983-1987, 1989-1991.
  - Member of Boards of the following Wharton Centers:
    - The SEI Center for Advanced Studies in Management (Founder), 1988 to present
    - The Lauder Institute (Founder) (1983 to present)
    - Knowledge@Wharton (2011 to present)
- 
- The Alfred West, Jr. Learning Lab (Initiator of the Lab and Founder of the External Advisory Committee), 2001-2005
  - Risk and Decision Process Center, 1984-1986
  - The Manufacturing and Logistics Forum, 1992-2000
  - The Wharton/PIMS Research Center (Co Founder), 1985-1998
  - U.S. Japan Management Studies Center, 1989-1992
  - Wharton Emerging Economics Program, 1992-1995
  - The Wharton Center of International Management Studies (Founder), 1981-1983
  - Wharton Public Policy Initiative, 2013-present
- Dean's Planning Task Force (1986).
  - Member of the School's Executive Education Policy Committee, 1987-1989.
  - Member or chairman of a number of Chair Search Committees, including seven chairs in Marketing (1985, 1987, 1988-1990, 1992, and 1997), Entrepreneurship (1984-1985, 1997-1998), International Management (1984-1985), Operations Management (1986), the chair and director of the US-Japan Center (1988-1991), the chair in Managerial Economics (1989), the chair in Information Technology (1996-1997), and the chair in Electronic Commerce (1999).
  - Member of the (ad hoc) Committees to Review Various Units and Departments:
    - The Snider Entrepreneurial Research Center, 2004-2005
    - Finance Department, 2001-2002
    - The Real Estate Center, 1988
    - Social Systems Science, 1985-1987
    - U.S. Japan Center, 1985-1986
    - Multinational Enterprise Unit, 1977-1978
  - Member of the School's Faculty Personnel Committees of:
    - The Health Care Systems Unit, 1974-1975.
    - The Multinational Enterprise Unit, 1978-1979.
  - Member of the Committee on Academic Freedom, 1977-1978.
  - Chairman of the Advisory Committee for the Wharton Executive MBA Program, 1974-1975.
  - Chairman of the Wharton School Doctoral Admissions Committee, 1974-1975.
  - Graduate Academic Standards Committee, 1969/1970 – 1971-1972. Chairman of its subcommittee for the evaluation and redesign of the school's grading system.
  - A number of Ad Hoc Committees and task forces for the:
    - development of a core Ph.D. Behavioral Science Course, 1972-1973,
    - redesign of the International Business program, 1971,
    - review of the Economic Offerings for Business and Applied Economic doctoral students, 1970-1971,
    - development of a Continuing Education Program in Health Care Administration, November 1971-October 1973.
  - Evening School Committee, 1972-1973.
  - Behavioral Lab Planning and Implementation Committee, 1989-1990.

## E. Doctoral Dissertations Supervised

Bent Stidsen (1972); Yehoshua Buch (1972); Kathy Villani (1973); Rene Y. Darmon (1973); Arun K. Maheshwari (1973); Chris Hetzel (1973) winner of the AMA Doctoral Dissertation Competition; Arun K. Jain Honorable mention at the AMA Doctoral Dissertation Competition; Joel Huber (1974); Irwin D. Reid (1975); Chris Buss (1979) winner of the AMA Doctoral Dissertation Competition; Robert J. Thomas (1980) Winner of the Academy of Marketing Doctoral Dissertation Competition; Cynthia Fraser (1980); Joel Steckel (1981) Honorable Mention AMA Doctoral Dissertation Competition; John

Deighton (1983); Rajeev Kohli (1984); Oliver Heil (1988); Kamel Jedidi (1988); Bari Harlam (1989); Kris Helsen (1990); Nino Buran (1991); Hoon Young Lee (1992); Rajeev K. Tyagi (1994); Amy Kallianpar (1998).

## **F. Addresses to Alumni Club and Other Groups Regarding:**

### **1) The Joseph H. Lauder Institute**

Illustrative addresses to alumni clubs and other groups on the changing needs for management education and the University's response -- The Joseph H. Lauder Institute.

#### 1. Alumni Clubs addressed include:

- Toronto (August 1987)
- Milan (October 1987)
- Philadelphia (January 1984, January 1986)
- Long Island (January 1984, March 1986)
- Cleveland (April 1986)
- Taipei (July 1985)
- Tokyo (June 1985)
- Hong Kong (July 1985)
- Dallas (December 1984)
- London (May 1984)
- Paris (December 1983)
- San Francisco (November 1983)

#### 2. University Groups:

- Board of Directors of the Association of Alumnae, (March 1984)
- The Vice Provost Advisory Board, (February 1984)
- Wharton Board of Overseers, (January 1984, 1997)
- Trustees (October 1983, January 1984)

#### 3. Other Groups (partial list):

- University of Pennsylvania Trustee Committee on Academic Policy (January 1988).
- 40<sup>th</sup> National Conference of the Council on International Education Exchange, San Francisco (November 1987)
- Title VI Center Lauder conference on International Studies and Foreign Language for Management. Philadelphia (May 1986)
- University of Pennsylvania Alumni (Alumni day, Philadelphia, May 1985)
- Delaware Valley Faculty Exchange Program on International Business and Language Studies (December 1984)
- AIESEC-Northeast regional conference (October 1984)
- Deans of 50 schools in an AACSB seminar on Internationalizing the Business Curriculum (March 1984)

### **2) Management 2000 project, the SEI Center for Advanced Studies in Management, and the revised MBA curriculum**

- Wharton External Affairs, May 2009
- Wharton-Recanati Program, 1993
- International Forum, 1993
- Erasmus University – Faculty and Administration, 1993
- Marketing Advisory Board Meeting, 1993
- Board of Directors of the Wharton Alumni Association, September 1988; May, 1993
- College of Business Administration, University of Texas at Austin C Advisory Board and Faculty, February 1992
- INSEAD Faculty and Administration, February 1992
- Security Industry Institute, 40<sup>th</sup> Anniversary Program, Wharton, March 1992\
- Wharton Advanced Management Program Participants, 1990, 1991
- The Wharton Graduate Advisory Board 1990



- Wharton's European Advisory Board 1991
- Alumni attending the May 1991 Alumni Reunions
- The SEI Center Board of Directors 1990-1991
- The Joseph H. Lauder Institute Board of Governors 1991
- The Wharton Board of Overseers, April 1988

### **3) Globalization Strategy**

- Dean's Advisory Board, February 1997
- Wharton Board of Overseers, March 1997
- Wharton Graduate Executive Board, March 1997
- Wharton Executive Education Advisory Board, May 1997
- European Advisory Board 1997
- Wharton Faculty 1997

### **4) Wharton's Information Management Initiatives (WIMI)**

- All Wharton Departments 1998 – 2001
- The 1<sup>st</sup> Conference of the Wharton Alumni Club of Israel March 2001
- Dean's Faculty Lunch, April 1998

### **5) Cross-Functional Integration of the MBA Curriculum**

- Ph.D. Proseminar (Fall 2003)
- CEO Panel for the entering 2004 class (August 2003)
- Graduate Executive Board (March 2003)
- Wharton Faculty (Feb 2003)

### **6) Wharton Fellows Program**

- Wharton Executive Education Advisory Board (April 2004)
- Wharton Alumni Club of Atlanta (November 2001) and Israel (December 2001)

### **7) Wharton School Publishing**

- Wharton Executive Education Group (January 2005; May 2006)
- Jay H. Baker Retailing Initiative Board (October 2005)
- Wharton School External Affairs group (February 2004)

### **8) Illustrative presentations regarding The Power of Impossible Thinking**

- Alumni Leadership Conference, Hong Kong (May 2007)
- Wharton Connect: On Campus (March 2007)
- Wharton Connect (October 2006)
- Organizational Development Network of Greater NYC (October 2006)
- Wharton Staff Workshop (September 2006)
- The Wharton Club of New Jersey (July 2006)
- CEIBS @ Wharton (July 2006)
- Wharton Sports Business Initiative (May 2006)
- Microsoft's Latin America Financial Services CEO Roundtable (March 2006)
- LinkS@Wharton (November 2005; August 2006)
- Merrill Lynch, Investment Banking Institute at Wharton (August 2005)
- The Greater Glenside Chamber of Commerce Meeting (June 2005)
- Wharton Fellows Event, Singapore (March 2005)
- EMTM Alumni Council (February 2005)
- Miami Wharton Club (December 2004)

- Advertising Research Foundation Breakthrough Conference (November 2004)
- Washington, D.C. Clubs of Wharton and AFLSE (September 2004)
- Deutsch Bank External Insights, New York (September 2004)
- Executive Briefing to Federal Express (September 2004)

## 9) Competing in a Flat World

- Links @ Wharton, Philadelphia (October 2008)
- University of Monterrey, Monterrey, Mexico (October 2008)
- American Chamber of Commerce in Hong Kong, Hong Kong (July 2008)
- The Wharton Club of Spain, Madrid, Spain (June 2008)
- CASRO International Research Conference, New York (May 2008)
- Wharton Club of Southern California, Santa Monica, California (April 2008)
- Wharton Club of New York, New York, New York (February 2008)
- Wharton Fellows, New York, New York (February 2008)
- FirstCaribbean Leadership Programme, Philadelphia, Pennsylvania (November 2007)
- Wharton Marketing Conference: Back to Class Session (October 2007)
- Milken Institute Global Conference, (April 2006)

## II. University of Pennsylvania – University Committees:

- Integrated Product Design – Overseer, 2008-2012
- Chair, Penn Social Responsibility Advisory Committee, 2008-2009 and 2009-2010.
- Committee for generating new revenues by medical education initiatives, University of Pennsylvania Health System, 2007-2008.
- Member of the Institute for Strategic Threat Analysis & Response @ Penn (ISTAR) Advisory Board, 2007-
- Research Foundation Committee, Social Science and Management Review Panel, 1999-2006.
- Member of the Faculty Advisory Group to Campus Development Planning Committee, 2005-2006.
- Member of the Committee on International Programs, 2002-2006
- Member of The Ackoff Center Advisory Board, 2001-2006
- Member of the Provost Art and Culture Committee, 2002-2004
- Faculty Senate Committee on Administration, 1995-1998.
- Chair, Subcommittee of the Faculty Senate Committee on Faculty Teaching Evaluations, 1997-1998.
- Chairman of Special Presidential Committee on Borderless Education, 1997-1998.
- Provost's Task Force on the University of the Global Information Age, 1996-1997.
- Faculty Editorial Board, University of Pennsylvania Press, 1996-1997.
- Member of the Provost's Committee on Information Science and Technology, 1996-1997.
- Member of the Provost's Committee on Distance Learning, 1996-1997.
- Chairman of a new university committee focusing on innovative revenue generation, 1992/1993 and 1993/1994. Members include the President, Provost, Chairman of the Board of Trustees, 3 deans, 3 trustees, and 3 faculty members.
- Chairman of a Subcommittee for the Evaluation of the University Office of International Programs, 1990-1991 and of a Subcommittee to Evaluate the University's Off-Campus Programs, 1991-1992.
- Member of the Provost Task Force on International Programs (1992/1993; 1993/1994).
- Member of the Provost International Council, 1990-1992.
- Member of the Commission for the 250<sup>th</sup> Anniversary Celebration of University of Pennsylvania, 1987-1990
- Advisory Board of the PBS series on The Global Economy, 1990.
- University of Pennsylvania correspondent for PBS program on Geo-economy, moderated by Ted Koppel, May 1990.
- Chairman of the Faculty Council of the Joseph H. Lauder Institute, 1983-1988.
- Member of the Board of Directors of the Joseph H. Lauder Institute, 1983 to present.
- Member of the Advisory Board of the office of International Programs, 1980 to present.
- Chairman, the Wharton Dean Search Committee, (selected Russ Palmer)1982/1983.

- The Senate Committee on the Economic Status of the Faculty, 1978/1979 (member); 1979/1980 (chairman).
- Member of the University's Committee on Research, 1977/1978. Chairman of its subcommittee for evaluation of the University's Policy and Conduct of Research Programs.
- Member of the FAS – Wharton Committee, 1975-1977.
- Member of the subcommittee of the University's Academic Planning Committee for the Measurement of Academic Performance, 1972/1973.

### **III. The Interdisciplinary Center (IDC), Herzliya, Israel**

- Chairman, Higher Academic Council 1999-present
  - Founder of the American Friends of IDC 1998 and a Member of the Board, 2003-present
  - Faculty Promotion and Appointment Committee: Chairman 1999-2005; Member 2005-present
- 
- Founder of the American Friends of IDC 1998 and a Member of the Board, 2003
  - Designed the week-long programs at Wharton for its visiting MBA class since 2002
  - Chairman, International Academic Advisory Board, 1994-2000
  - Delivered the first graduation address of the Wharton IDC Marketing Communication Program, March 1999
  - Delivered the first Graduation Address, October, 1998
  - Co-founder (1994)
  - Delivered the first Zoltan Wind lecture, 1996
  - Occasional lectures in various courses, faculty seminars, and public addresses since 1995

### **IV. Other Universities**

#### **I. Courses Taught**

- Erasmus University (The Netherlands) – A variety of courses on marketing strategy and marketing science (1993).
- University of Tokyo (Japan) – Marketing Science (1992).
- University of New South Wales (Australia) – Doctoral Seminar in Marketing (1977).
- University of California at Berkeley – Product Policy, Doctoral Seminar (1975).
- University of Tel Aviv (Israel) – Consumer Behavior, Marketing Seminar (1968).

#### **II. Faculty Promotion Review – Illustrative Universities**

Columbia University, Harvard University, Massachusetts Institute of Technology, New York University, Pennsylvania State University, Stanford University, Tel Aviv University, University of California at Los Angeles and at Berkeley, University of Chicago, University of Georgia, University of Illinois, University of Pittsburgh, University of Rochester, University of Southern California, University of Texas, Yale, and others.

#### **III. Program/School Review**

- Indian School of Business – Organization of the Wharton Planning Meeting, April 2002.
- Rice University – member of the external review committee, 1996.
- University of Santa Clara – member of a Site Review Team for the evaluation of the school's marketing department, 1981.
- University of Tel Aviv – Initiator and organizer of the school's faculty colloquium, working paper series, planned and organized a number of the school's executive development programs and various other activities, 1968/1969.
- The Technion, Israel Institute of Technology – Outside examiner at the Graduate Division of the Technion – The Israel Institute of Technology, Haifa, 1969.



## 5. OTHER PROFESSIONAL ACTIVITIES

### I. Development of Research Programs [Illustrative List]

1. The Future of Advertising (2007 to present)\*
2. Network-Based Strategies and Competencies (2007-present)
3. Creativity and Innovation (2006-present)
- 
4. SEI Center project Toward a New Theory of the Firm (2004-2008)
5. SEI Center project with Business Executives for National Security and FINCEN using the Suspicious Activity Reporting System (SARS) for identifying terrorist financing (2003-2004)
6. SEI Center project, Assessing the True Value of the Firm, Co-Directed with David Larcker (2002-2003)
7. The Wharton Office of Homeland Security (OHS) Project, Economic Vulnerability to Terrorism: Assessment, Prioritization and Action Implications, Co-Directed with Paul Kleindorfer (2001-2002)
8. Digital Transformation Project in Collaboration with McKinsey, WeBI and the Fishman-Davidson Center for Service and Operations Management (2001-)
9. e-Curriculum R&D Initiatives (2000-2002) and Curriculum R&D for the Wharton Fellows Decision Support Network (2001-2004)
10. The SEI Center's research program on Creating a 21<sup>st</sup> Century Enterprise. (1990 to present)
11. Established the Value of Marketing program. (1993-1997)
12. Initiated (with Frank Bass) the Empirical Generalizations in Marketing program. (1993-1995)
13. Co-founded (with Greg Farrington) the Virtual University Lab program (1995-1997)
14. Initiated the Computers and Art program for the ENIAC at 50 celebration (1998-1999)
15. Co-developed (with Bob Holland) the SEI Center's George Harvey Program on Value Creation Through Diversity (1996-2000)
16. Co-founded (with Paul Kleindorfer) the Information Management Initiatives Research Program (1998-1999)

### II. Editorial Activities

1. Founding editor, Wharton School Publishing, 2003-2008 [published books are listed on pages 37-39]
2. Initiator and editor of *Advances in Marketing Research and Modeling: Progress and Prospects – A Tribute to Paul E. Green*, Kluwer Academic Publishers, 2002.
3. Initiator and editor of *The Wharton School Publishing Newsletter* (monthly July 2005-July 2008)
4. Initiator and Co-Editor of the *Wharton Fellows Newsletter* (quarterly 2003-4; monthly January-December 2005).
5. Initiator and editor of *Wharton Executive Library* (published by Oxford University Press), 1984-1987. The series was aimed at familiarizing top management with recent developments in the various management disciplines. Books published include:
  - Gerard Adams, *The Business Forecasting Revolution, Nation-Industry-Firm*, 1986.
  - Leonard M. Lodish, *The Advertising and Promotion Challenge, Vaguely Right or Precisely Wrong?*, 1986.
  - David Solomons, *Making Accounting Policy: The Quest for Credibility in Financial Reporting*, 1986
  - James C. Emery, *Management Information Systems: The Critical Strategic Resource*, 1987.
6. Initiator and editor of the Scientific Press *Computer Based Marketing Series*. 1984-90. The series offers short books on specialized marketing topics with accompanying PC software. Books published include:
  - Paul E. Green, *CAPPA Electronic Questionnaire Display and Analysis*, 1986
  - Gary Lilien, *Marketing Mix Analysis with Lotus 1-2-3*, 1987
  - John Hauser, *Applying Marketing Management: Four PC Simulations*, 1987
  - Darral G. Clarke, *Marketing Analysis and Decision Making: Text and Cases with Lotus 1-2-3*,

- 1987.
  - Gary Lilien, *Marketing Management: Analytical Exercise with Lotus 1-2-3*, 1988.
7. Editor-in-Chief, *The Journal of Marketing* 1978-1981 (Vol. 43-45)
  8. Area Editor, *Marketing Science*, 1981-83 (Vol. 1-2); occasional Area Editor (2002-)
  9. Advisory Editor of the Addison-Wesley Marketing Series, 1974-1981. Books published under my editorship include:
    - David Hughes, *Marketing Management*, 1978.
    - James Bettman, *An Information Processing Theory of Consumer Choice*, 1979.
    - Richard N. Cardozo, *Product Policy: Cases & Concepts*, 1979.
    - F.E. Brown, *Marketing Research: A Structure for Decision Making*, 1980.
  10. Member of the Editorial Boards of:
    - Journal of Interactive Marketing, 1998-present
    - Journal of Business to Business Marketing, 2004
    - Journal of Global Marketing, 1986-1990
    - Journal of Product Innovation Management, 1982-1990
    - Annual Review of Marketing, 1980-1982
    - Computer Operations, 1968-1970
    - Journal of Business Research, 1974-1977
    - Journal of Consumer Research, 1973-1984
    - Journal of High Technology Management and Market Research, 1988
    - Journal of Marketing Research, 1978-1981
    - Journal of Marketing, 1971-1978
    - Journal of Organizational Behavior and Statistics, 1983
    - Journal of Pricing Management, 1989
    - Journal of Segmentation in Marketing, 1997
  11. Occasional reviewer for:
    - Decision Sciences
    - IEEE Transactions on Engineering Management
    - Journal of Management Studies
    - Journal of Marketing
    - Management Science
    - Marketing Science
    - Operations Research
    - Public Opinion Quarterly
    - R&D Management
    - The Journal of Economics and Business
    - The Wharton Quarterly
  12. Screening editor, *Journal of Consumer Research*, 1973-1974.
  13. A judge of competitive research papers submitted to the National Conference of The AMA Academic (August) Conference in - Minnesota (1971), Houston (1972), Washington (1973), Portland (1974), Rochester (1975), Memphis (1976), Chicago (1980), Chicago (1984).
  14. A judge of Ph.D. dissertations submitted to the AMA Doctoral Dissertation Competition, 1974, 1976, 1977, 1981, 1982, 1983. And the MSI Dissertation, and other award competitions 1984, 1985, 1990
  15. Reviewer of papers submitted to the Market Measurement and Analysis Conference (renamed Marketing Science Conference) since 1981.
  16. Occasional reviewer of applications for research grants for the Social Science Research Council

(London, England) since 1972; and the National Science Foundation, Division of Science Information and Advanced Productivity Research and Technology, since 1977.

17. Reviewer of manuscripts for a number of publishers and universities, including the MacMillan Company, the Center for Research of the College of Business Administration of Pennsylvania State University, the Graduate School of Business, Columbia University, Prentice Hall, Jose Bass and others.

### **III. Offices Held in Professional Associations**

#### **AMA**

1. Member of the Board of Directors, The Philadelphia Chapter of the AMA, 1979-1983.
2. Program Chairman of:
  - a) The 1977 AMA Doctoral Consortium Philadelphia, August 1977.
  - b) The 1975/1976 AMA Attitude Research Conference, Hilton Head, SC, February 1976.
  - c) The National Educators AMA Conference, Washington, D.C., August 1973.
3. Member of a number of AMA councils including the Advisory Council of the National Marketing Honorary Society of the AMA - Alpha Mu Alpha, 1980/1981 and the Educational Policy Council, 1977/1978.

#### **TIMS**

1. Chairman, 1974/1975; Chairman Elect, 1973/1974; and Vice Chairman, 1971/1972 of the Institute of Management Science College of Marketing.
2. Program Chairman of:
  - a) Marketing track on "Marketing Science for Increased Competitiveness of Firms and Countries," 1988 Washington, D.C., TIMS/ORSA Conference.
  - b) The 1981 Market Measurement and Analysis Conference (with Vijay Mahajan).
  - c) The Delaware Valley Chapter, 1967/1968.
3. Member of the Program Committees of the Market Measurement and Analysis Conference: University of Texas, 1980; New York University, 1981; and the Marketing Science Conference: University of Chicago, 1983; Vanderbilt University, 1985; University of Texas at Dallas, 1986; Centre HEC-ISA, Jouy-en-Josas, France, 1987; Washington University, 1988.
4. Member of the Advisory Board of Marketing Science, 1983-\_\_\_\_\_

#### **IAM – The International Academy of Management**

1. Chancellor, 2000-2006.
2. Vice Chancellor for the Americas, 1995-2000.
3. Program chairman, the Americas Conference, 1994, 1998.

#### **MASB – Marketing Accountability Standards Board**

1. Member of the Board of Directors since 2010.

#### **MSI – Marketing Science Institute**

1. Chair of a task force on e-business evaluation (part of the Metrics program), 1999.
2. Academic Trustee (1989-1995).
3. Member of the Academic Advisory Council (1983-1987).
4. Member of a number of steering groups, including
  - Marketing Strategies Steering Group, 1983-1987.
  - The International Advisory Steering Committee (1985-1987).
  - Information Technology Steering Committee (1990-1992).

## Other

1. The Diebold Institute Entrepreneurship and Public Policy Project, Committee of Advisors (1999-\_\_ ).
2. World Management Council. Member of the Academic Advisory Board (1988–1989).
3. Member of the interdisciplinary task force (organized by AMA) for the design of the *Journal of Consumer Research*, (October 1971–July 1972). Founding member of the Policy Board of the *Journal of Consumer Research* (1972–1983); Chairman of the Board (1977–1978); Chairman of the 1976 and 1981 Editor Search Committees.
4. Member of the Philadelphia's International City Steering Committee (1983–1985, 1987–1988).
5. Member of the Publication Committee of AAPOR (1973-1974).
6. Member of Program Committee of 1979 ACR Conference.
7. Member of the Advertising Research Foundation 75<sup>th</sup> Anniversary Convention Program Committee (2010)

## IV. Planning and Organizing Professional Programs at the University

1. Empirical Generalizations in Advertising, December 2008; and Empirical Generalizations in Advertising II, "What works in the New Age of Advertising and Marketing," May 2012, with the Ehrenberg-Bass Institute for Marketing Science, University of South Australia
2. Advertising Effectiveness, with the Wharton Customer Analytics Initiative, May 2013.
3. Gaps in Measuring Advertising Effectiveness, with the Advertising Research Foundation, 2012-2013.
4. Chair, "Network-Based Strategies and Competencies," a joint project with INSEAD co-directed with Paul Kleindorfer, Initial Workshop, May 3, 2007. Conference, November 2007.
5. Chair, "The Future of Advertising," a joint project with the ARF, Workshop, March 30, 2007. Conference, December 2008.
6. Initiated and chaired a task force to develop a Marketing Certification Program (2003-2004)
7. Co-Designed with Bob Mittelstaedt an executive education program on "Wharton on the New Reality of Business," December 2001 [including the design of the "Wharton Post 9/11 Business Scenario" (October 2001-)] and May 2002.
8. Designed and directed the executive programs, "Winning in the Next Millenium," December 1998.
9. Initiated "The Impact of Computers and Information Technology on Management: 1946, 1996, 2001," May 13-14, 1996 program for the ENIAC at 50 celebration (1994-1995).
10. Initiated the "Computers and Art" program for the ENIAC at 50 celebration (1994-1995).
11. Participated in the original design of the Wharton – AT&T Marketing Management Program. Taught in the 1973, 1975 -1980 programs.
12. Developed, organized and taught a Marketing Research Seminar for U.P. Clinical Scholars Group (February–May 1975 and February–April 1976).
13. Planned and taught the marketing management section of a number of advanced management programs of the University of Pennsylvania:
  - Dean Witter - Wharton Account Executive Program, 1986.
  - Securities Industry Association Program, annually since 1982.
  - Advanced Management Program for Overseas Bankers, 1975, 1976.
  - Program for Health Care Executives, 1973, 1975, 1982.
14. Participated in various executive development programs of the Marketing Department of the University of Pennsylvania:
  - Marketing for the Postal Service, 1983.
  - Marketing Strategy Seminar, since 1981 (January & May).
  - Pharmaceutical Advertising Council, 1980/1981.
  - Wharton Salesforce Management Seminar, since 1980 (January & May).
  - Dixie/Marathon (American Can Company), May 1977.
  - Marketing Research Seminar 1977-1983.
  - General Building Contracting Association, Inc., January 1977.
  - Center de Promotion du Commerce International, Chambre de Commerce et d'Industrie de Nantes, 1976, 1978-1980.
15. Planned and taught (with Thomas Robertson) a number of seminars on Health Care Marketing for:
  - The Virginia Hospital Association, February 1978.
  - The New York Management Center, September and November 1977.
  - The Wharton School's Lifelong Education Program, October 1976.



16. Co-founder, organizer of the Wharton teaching component, and frequent lecturer in the Wharton/Israel Binational Marketing Management Program [The Consulting Practicum] 1979-1995.

#### **V. Award Committees**

1. Member of the Sheth Award Committee to select the winning *Journal of Marketing* article that had the greatest long-term impact on the marketing discipline, 2009-2010
2. Member of the Parlin Board of Governors, 1978-1983, 1995-2008 ; Chairman of the Board, 1980/1981.
3. Member of the selection committee for MIT's Sloan Management Review/Price-Waterhouse Company, 2003 – Best Article Award.
4. Member of the "Global Marketing Scholar's Prize" Selection Committee, 2011, hosted by Korean Academy of Marketing Science
5. Nominator for the Marketing Communications Award of the World Technology Network, 2002-present
6. Initiator of the Lauder Institute Award for the Research Paper that Best Advances the Theory & Practice of International Management Science. Administered by TIMS and Chairman of the first award, 1989.
7. Member of the W. Arthur Cullman Executive Award Selection Committee (Ohio State University), 1985-1986
8. Member of a panel of judges for the evaluation of nominees for the Paul D. Converse Awards for Outstanding Contributions to the Development of Theory and Science in Marketing, 1974, 1977, 1981, and 1986.

#### **VI. Planning and Organizing Professional Programs Outside the University**

1. KMDC Program, Kuala Lumpur, The Power of Impossible Thinking and Its Implications for Marketing Innovations, March 15-16, 2005.
2. Co-director (with Hotaka Katahira) of the Marunouchi Global Center Management Program, 2002.
3. Planned and taught a number of two-day seminars on "Recent Developments in Marketing Research Methodology" for:
  - The Management Center, University of Bradford, February 1975 and May 1976.
  - The University of Laval, Canada, November 1973.
  - The University of Social Sciences at Grenoble, France with (Paul E. Green), May 1973.
4. Planned and taught various AT&T Executive Development Seminars on:
  - "Multivariate Analysis in Marketing," March and August 1975.
  - "Market Analysis," December 1974, and June 1975.
  - "Market Segmentation," September 1974, November 1975 and March 1976.
  - "How to get the Most Out of Your Marketing Research," Spring 1974.
  - "Consumer Behavior," October 1972, January 1978.
5. Planned and taught two one-day executive seminars on Conjoint Analysis and New Product Policy at the University of New South Wales (Australia), June 1977.
6. Planned and taught a number of executive seminars at the University of Tel Aviv: Marketing Strategy (1969); Product Policy (1977); Marketing and Corporate Strategy (1978, 1980); New Development in Product and Marketing Research (1980).

7. Planned and taught the marketing research section of the Bank Marketing Program of the Graduate School of Bank Marketing, April 1977.
8. Planned and taught a series of two-day seminars on Marketing Strategy for the New York Telephone Company, February and April 1976.
9. Initiated, planned and organized a number of two day workshops on:
  - Concept Testing, University of Pennsylvania, March 1972.
  - Industrial Buying Behavior (with Frederick E. Webster and Richard N. Cardozo), sponsored by the AMA & the University of California at Berkeley, April 1971.
  - Research Utilization, (with Steve Greyser and Randy Batsell), sponsored by the AMA and MSI, April 1979.
  - Advances and Applications in New Product Forecasting: Innovation Diffusion Models (with Vijay Mahajan) sponsored by MSI, October 1983.
10. Organizer and chairman of various sessions at annual conferences of various professional associations (illustrative list):
  - "Design Meets Marketing: Service Innovation by Design," Marketing Science Institute and Corporate Design Foundation Conference, Stanford University, October 17, 2007.
  - "Marketing science: Accomplishments and challenges in the global information age," plenary session at Informs, Philadelphia, November 1999.
  - "Consumer Labs," Marketing Science Conference, March 1997.
  - "Global Marketing Strategy," 1991 ORSA/TIMS Meeting
  - "Creation of Innovative Marketing Knowledge: An Interdisciplinary Perspective," 1989 AMA Marketing Educators Conference, August 1989.
  - Strategic Alliances," TIMS Osaka, Japan, July 1989.
  - "Industrial and New Technologies Marketing: Lessons from Industry," International Research Seminar in Marketing, La Londe les Maures, France, May 1989.
  - "New Product Development Models," ORSA/TIMS, San Diego, October 1982.
  - "Product/Market Portfolio Models," ORSA/TIMS, Colorado Springs, November 1980.
  - "The Role of Multivariate Analysis in Consumer Research," APA, Toronto, 1978.
  - "Applications of Management Science to Market Segmentation," TIMS, Miami, 1976.
  - "Recent Developments in Management Science Application in Marketing," TIMS, Las Vegas, 1975.
  - "Multidimensional Scaling and Conjoint Measurement in the Study of Multidimensional Psychophysics," ACR, Boston 1973.
  - "Implementation of Management Science in Marketing," TIMS, Houston 1972.
  - "On the Teaching of Consumer Behavior," AMA, Houston, 1972.
  - "Family and Industrial Buying Behavior," AMA, Minneapolis, 1971.
  - "Multidimensional Scaling in the Study of Consumer Behavior," ACR, 1970.
11. Planned, organized and taught a Marketing Management Program for the top executives of the Union of Cooperative Societies (Israel), April to July 1969.
12. Planned and taught marketing courses at a Graduate Program for Marketing Consultants at the Israel Institute of Productivity, September 1968 to January 1969.
13. Academic advisor to a number of organizations engaged in Management Training in Israel. Primarily the Israel Institute of Productivity, and the Technion Research and Development Foundation Ltds., January to August 1969.

## **VII. Presentations\***

- A. Presented papers at various national conferences of the American Marketing Association**  
December 1967; June and August 1968; August 1969; August 1970; June and August 1974; April

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\*Illustrative recent presentations are listed by topic starting on page 76

and August 1975; August 1976; August 1977; June and August 1978; June and August 1979; June and August 1980; August 1981-1990, March 1990, August 1991; August 1991, April 1993; February & August 1994, August 1995, August 1996, August 1997, February 1998, August 1999.

**B. Speaker in various conferences and workshops**

- Association for Consumer Research (ACR), 1968, 1970/1973, 1975, 1977, 1984.
- The Institute of Management Science (TIMS), 1969, 1972, 1974-1978, 1980- .
- American Institute of Decision Sciences (AIDS), 1974, 1976.
- American Association of Public Opinion Research (AAPOR), 1974/1975.
- American Psychological Association (APA) DIV 23, 1978.
- American Statistical Association (ASA), 1978.
- AMA Philadelphia Chapter, 1980/1981.
- Annual Conference of the Strategic Management Society, 1984.
- Annual Conference of the Pharmaceutical Marketing Research Group (PMRG), 1986, 1987.
- Annual Conference of the World Future Society Assembly, Washington, D.C., 1993.

**C. Speaker in a number of the AMA Attitude Research Conferences:**

1967, 1971, 1973, 1976, 1987.

**D. Member of the Faculty of the AMA Doctoral Consortiums**

- University of Colorado, 1996
- University of Santa Clara, 1994
- University of Southern California, 1991
- New York University, 1987
- University of Notre Dame, 1986
- University of Michigan, 1983
- University of Minnesota, 1982
- Pennsylvania State University, 1980
- University of Maryland, 1981
- University of Wisconsin, 1979
- University of Chicago, 1978
- University of Pennsylvania, August 1977
- University of Texas, August 1976
- University of Illinois, September 1971

**E. Member of the Faculty of the First Indian Doctoral Consortium, 2012**

**F. Member of the AMA Faculty Consortium, Chicago 1997**

**G. Illustrative papers delivered in various professional workshops**

- Applications of Multidimensional Scaling to Marketing and Business, sponsored by the University of Pennsylvania and Bell Laboratories, June 1972.
- Planning Data for STI Managers, Sponsored by NSF office of Science and Information, December 1976.
- Synthesis of Knowledge of Consumer Behavior, sponsored by the RANN Program National Science Foundation, April 1975.
- Multinational Product Management, sponsored by the Marketing Science Institute and the AMA International Marketing Division, January 1976.
- Consumer and Industrial Buying Behavior, sponsored by the University of South Carolina, March 1976.
- Organizational Buying Behavior, sponsored by the University of Pittsburgh, April 1976.
- Consumer Research for Consumer Policy, sponsored by the MIT Center for Policy Alternatives, July 1977.
- Analytical Approach to Product-Marketing Planning, sponsored by the AMA and MSI, University of Pittsburgh, November 1977, October 1981.

- Interfaces Between Marketing and Economics, sponsored by the University of Rochester, 1978, 1983.
- Industrial Marketing, Penn State University, May 1982.
- Market Measurement and Analysis, renamed Marketing Science Conference sponsored by ORSA/TIMS:
  - Centre HEC-ISA, Jouy-en-Josas, France, 1987.
  - University of Texas at Dallas, 1986
  - Vanderbilt University, 1985
  - University of Chicago, 1984
  - University of Southern California, 1983
  - Wharton, March 1982
  - New York University, March 1981
  - University of Texas, Austin, March 1980
  - Stanford University, March 1979

#### **H. Illustrative addresses at various top management conferences and meetings**

- Moderator of Key Issue Forum on Social Media and Brand Opportunities, ARF Re:think Conference, New York, NY, March 23, 2010
- "Moving From Me to We: The New Competitive Edge," Milken Global Conference, Los Angeles, April 28, 2008.
- "The Wisdom of Crowds in Today's Digital World: We vs. Me," Milken Global Conference, Los Angeles, April 23, 2007.
- "Innovation," Telenet Top Executive Strategic Workshop, June 19, 2006.
- "The 1st Mover Advantage Challenge," Telenet Top Executive Strategic Workshop, June 19, 2006.
- "Getting More with Less," Telenet CEO Strategy Review, June 19-20, 2006.
- "Advances in the Management of Technological Innovation," Executive Briefing at Samsung Electronics, June 2, 2006.
- "Brand Names and Logos," Penn Humanities Forum on Word and Image, February 2006.
- "New Frontiers in the Practice of Management" with Paul Kleindorfer, CEO Workshops at IDC Israel, January 2006.
- "Strategic Trends on the Global Marketplace," The Sixth Herzliya Conference on The Balance of Israel's National Security, January 2006.
- "Recent Developments in Marketing and Branding Strategies," presented to the Board and top management of IDT HK, August 2005.
- "Tapping Opportunity in the Developing World: Innovative Solutions for Companies and Communities," Milken Institute Global Conference, April 2005.
- "Return on Marketing Investment: Progress, Problem, and Prospects," Council of Marketing Executives, The Conference Board, October 6, 2004.
- "The Power of Impossible Thinking: A Prerequisite for Profitable Growth," Milken Institute Global Conference, April 27, 2004.
- "The Transformation Challenge," YPO at SEI, March 2004.
- "Technology for Profitable Growth: Progress, Problems, and Prosperity, eBRC Board of Directors meeting, Philadelphia, May 2003.
- "Business and the Pending Wars," a global senior executive Web conference, February 2003.
- "e-Business Revolution: R2R (Return to Reality)," World Leadership Forum of the Foreign Policy Association, New York, September 2000.
- "UNIG Top Executive Forum," Singapore, August 2000.
- "The Future of the Marketing Organization," MSI Board of Trustees Meeting, April 2000.
- "Preparing for 2002: Creating a Leading Global Medical Communication Company for the 21<sup>st</sup> Century," Top Management of Medius Group Int. Paris, May 1997.
- "The Next Enterprise: Creating a Successful 21<sup>st</sup> Century Enterprise," The Hong Kong Management Association, January 1996.
- "Building the 21st Century Corporation Today: A Marketing Perspective," A one day session for CEOs who participate in the MASTERSHIP program (LA) January 1990.
- "Growth Outlook for Consumer Products and Services" to the policy committee of Anheuser-Busch Company, 1986.

- "Marketing Management in Securities Firms" SIA Regional conference, 1986.
- "Recent Developments in Marketing Strategy," to Dutch top executives by Horinga & DeKoning, October 1986.
- A number of 1-day Top Management Seminars organized by Studio Ambrosetti (Italy)
  - Developing and Launching New Products (1986)
  - Marketing and Corporate Strategy (1987)
  - Marketing for Financial Institutions (1987)
  - Domestic and International New Business Entry Strategies 1988)
  - Strategic Marketing and New Product Development (1989)
  - How to Develop Products More Often and Get Them to Market Faster (1991)
  - The Consumer Goods Scenario: The Challenge (1992)
  - Marketing Driven Bus Strategy in the Global Information Age (2000)
- "The Challenge of Marketing" Board of directors and top management of Grand Metropolitan, 1985.
- "Advances in marketing and Business Strategies" Top management group of the John Fluke Manufacture Co., 1985.
- "Global Marketing Strategies" YPO Chapter of Hong Kong, 1985.
- "Marketing for Hospitals" Hospital presidents program of the J&J Leonard Davis Institute program, 1985.
- "Global Marketing Strategies" Top executive group of MARS pet food business, 1984.
- "Marketing for the Evolving Company" Conference on "Financing & Managing the Evolving Company" sponsored by Arthur Andersen & Co. and the GSB University of Texas at Austin, April 1984.

#### **I. Illustrative Other Top Management groups addressed**

- MSI Trustees, Cambridge, Massachusetts, October 1983.
- Securities Industry Association Fall Meeting, N.Y., October 1982, Spring Meeting, April 2000, Homestead, Virginia, May 1982: keynote speaker.
- Three sessions at the 1979 YPO Central Area Conference, Williamsburg, October 1979.
- Two sessions at the YPO International University, Rio de Janeiro, May 1979.
- Two sessions at the 1978 YPO, Eastern/Northeastern Area Conference, Sea Island, Georgia, November 1978.
- Eastern Pennsylvania Chapter of YPO, October 1978.
- Two-day seminars for top executives of Latin American countries sponsored by Expansion Publishing Group, Mexico City, June 1978, (Marketing Strategy); June 1979 (the Marketing Audit); and December 1980 (Marketing for Top Executives).
- Bell Laboratories (Applied Statistics Area), 1978

#### **J. Guest lecturer at faculty research seminars and executive development programs of various universities and research institutes including:**

- Columbia University, 1974, 1976-1978
- Drexel University, 1977, 1984
- Erasmus University, The Netherlands, 1993
- Escola de Administrao de Empresas de Sao Paulo, Brazil, 1979
- European Institute for Advanced Studies in Management, Brussels 1981
- Florida Atlantic University, 1972
- Harvard University, 1981
- IESE Universidad de Navarra, 1999
- Indian Institute of Technology (IIT) Bombay, 1989
- INSEAD, France, 1992, 2000
- Institut Superieur des Sciences Economiques et Commerciales, Paris, 1981
- Interdisciplinary Center Herzliya, 1996, 1997, 1998, 1999, 2000
- Koc University, Turkey, 2000
- Laval University, Canada, 1973
- Katholieke Universiteit, Leuven, 2001
- Monash University, Australia, 1977

- Nanzan University, Nagoya, Japan, 1977
- New York University, 1979, 1984
- Northwestern University, 1980
- Norwegian School of Management, Norway, 1993
- Pennsylvania State University, 1978
- Southern Methodist University, Texas, 1982, 1984, 1986
- Stanford University, 1976, 1982
- State University of New York at Buffalo, 1975
- University of Bradford, 1975-1976
- University of California at Berkeley, 1975
- University of California at Los Angeles, 1976, 1980, 1990
- University of Capetown, S.A., 1982
- University of Chicago, 1981
- University of Groningen, 1986
- University of Houston, 1977
- University of Illinois, 1985
- University of Iowa, 1971
- University of Minnesota, 1973
- University of New South Wales, Australia, 1977
- University of Ottawa, 1974
- University of Pittsburgh, 1988
- University of Social Sciences, Grenoble, France, 1973
- University of Southern California, 1979
- University of Tel Aviv, 1977-1980, 1982
- University of Texas at Austin, 1984, 1997
- University of Tokyo, Japan, 1992, 1993, 1995, 1997
- University of Washington, 1979
- Yale University, 1982

**K. Speaker at various local and regional meetings**

of the American Marketing Association, 1967 to present, and national meetings of other marketing associations such as the National Account Marketing Association, 1973; the International Pharmaceutical Marketing Research Group, 1973; The National Association of Children's Hospitals and Related Institutions, 1976; American Management Association's advanced Marketing Research Seminars, 1967/1968; and the Marketing Science Institute conferences and management seminars, 1968-1994.

**L. Guest speaker at special seminars**

- The Australia and New Zealand Marketing Societies in Sydney and Melbourne, June 1977.
- "New Developments in Social Research," in the Symposium on Corporate Awareness, February 1977.
- The 11th Annual "New Horizons in Science," Conference of the Council for the Advancement of Science Writing, New York, November 1973.
- Various conferences of the Israel Advertisers' Association, The Technion Research and Development Foundation, Ltd., The Ministry of commerce and Industry, 1968/1969.
- Foreign market entry and import protection strategies, The Israel Institute of Management, October 1984.

**VIII. Presentations: Illustrative Topics**

**A. Creativity and Innovation**

- "Creativity & Innovation Problem, Prospects," SEI Growth Forum, May 25, 2013.
- "Enhancing Your Personal Creativity," The Academy of University of Pennsylvania, February 9, 2013

- "The ROI of Creatives," Cannes Lions International Festival of Creativity, June 19, 2012.
- "Rethinking Your Innovation and NPD Strategies," IDC's CEO Forum, May 24, 2011.
- Personal Power and Influence, July 14, 2010.
- "Innovation in Retailing: Progress, Problems and Prospects", Discussion at the Jay H. Baker Retailing Center, October 28, 2010.
- "Marketing Innovation: Reinventing your Marketing and New Product Launch," Marketing Management Program, MA Industries, IDC, November 23, 2009.
- "Selling Scents: Innovative Approaches to the Age Old Selling Challenge in a Flat World of Empowered Consumers," The Fragrance Foundation Conference, March 12, 2008.
- "Advances in New Product Development and Innovation," Mutual Art Lecture Series, November 2, 2007.
- "The Creative Economy: Art and Culture at Penn and in Philadelphia," Penn Arts Leadership Conference, May 9, 2007.
- "Advances in the Management of Technological Innovation," Executive Briefing at Samsung Electronics, June 2, 2006.
- "Innovation and Change in the Turbo—Global Environment: Lessons from the Transformation of 'Old Economy' Firms [and Universities] and The Challenges to Congress," Stennis Congressional Staff Fellows Program on Leadership in e-Business Environments: What Congress Might Learn, Washington D.C., May 2000.
- "Innovation and Change in the Turbo-Global Environment: Lessons from the Transformation of 'Old Economy' Firms [and Universities] and the Challenges to Congress," Stennis Congressional Staff Fellows Program on Leadership in e-Business Environments: What Congress Might Learn, May 2000.
- "Customerization: The New Management Challenge," The President's Forum of the Interdisciplinary Center in Herzliya, Israel, September 2000.
- "Innovation Strategy," New Product Development and Launch, April 1999.
- "Innovation and New Product Development," Tutorial at the 2nd International Workshop, Santiago, Chile, October 1996.
- "Innovative New Product and Service Development: Best Practice and Opportunities for Experimentation," The Israel-North America Business Conference, New York, October 1996.
- "Innovation in New Product Development: Best Practice in Research, Modeling and Applications," Presentation to the JMR Editorial Board on the Special issue, August 1996.
- "Creativity and Innovation: The Management Edge in the Technological Age," the First Wind Lecture at the Interdisciplinary University of Law, Management and Technology (ISRAEL), May 1996.
- "Product Launch," Software Development and Marketing for Competitive Advantage, IC<sup>2</sup>, The University of Texas Conference, March 20, 1996.
- "JMR Special Issue on Innovation in New Product Development: Best Practice in Research, Modeling and Applications," JMR Editorial Board Meeting, San Francisco, August 7, 1994.
- "A New Approach for Estimating the Demand for Interactive TV Products and Services, Interactive Industry 2000: Market Research for the Interactive Television Business," July 28-29, 1994.
- "Determinants of New Product Success: Lessons from the U.S. and Japan," Faculty and Ph.D. students seminar at Erasmus University, June 10, 1993.
- "Issues and Advances in New Product Development and Management: A U.S. Perspective," Advanced Industrial Marketing Strategy Seminar, September 18, 1992.

- "New Product Development: Problems, Advances and Prospects," Wharton's Advanced Industrial Marketing Strategy, March 19, 1992.
- "How to Develop Products More Often and Get Them to Market Faster: Guidelines for Functional Management," Ambrosetti Group, Milan, Italy, May 9-10, 1991.
- "Inducing Creativity and Innovation in Large Bureaucracies: Lessons from Marketing," RGK 4th International Conference on Creativity and Innovative Management, August 8-10, 1991, Los Angeles, CA.
- "Globalization: Opportunities for Innovative Research and Modeling," UCLA, January 9, 1990, Los Angeles, CA.
- "Increasing the Effectiveness of Your New Product Development," Indian Institute of Technology, November 1989, Bombay, India.
- "Improving the Effectiveness of the Industrial New Product Development Process: Lessons from Industry – The AS 400 Case," 16th International Research Seminar in Marketing, La Londe les Maures, France, May 19, 1989.
- "Developing and Launching New Products: Costs, Risks, and Conditions for Success," Studio Ambrosetti, AF Marketing Group, May 16, 1989.
- "What a Difference a Difference Can Make," Amoco Fabrics and Fibers Co-Leadership Council, May 1988.
- "A Innovation Diffusion and New Product Forecasting," TIMS Conference, November 1984.
- "The contribution of Research to Product Management and New Product Development." The 1983 ESOMAR congress August 1983 at Barcelona.
- The First Delaware Valley Meeting of the Product Development and Management Association (PDMA), December 1980.

## **B. Challenging your Mental Models**

- "Challenging Your Mental Models," Estee Lauder, February 28, 2013
- "Challenges and guidelines for building learning effectiveness," 2012 Inaugural AIM-AMA Sheth Foundation Doctoral Consortium, July 29, 2012
- "Challenging your mental, business and revenue models," Wharton Alumni club – Beijing, July 25, 2012
- "Challenging your mental, business and revenue models," Wharton Alumni Club – HK, July 20, 2012
- "Challenging your Mental Models," SEI Trust Company Operations, July 16, 2012
- "Challenging Your Mental Models," Israel Police Senior Management Program, June 11, 2012.
- "Challenging Your Mental Models in the Age of Empowered Consumers and Networks," SEI Executive Network, November 2, 2011.
- "Challenging Your Mental Models," Estee Lauder Companies Global Marketing Symposium, November 1, 2011.
- "Challenging Your B2B Mental Models," Google's Think B2B: Deconstructing Today's B2B Customers, October 6, 2011.
- "The Power of Impossible Thinking," Austria Connect, September 9, 2011.
- "Challenging Your Mental Models," NESS Executive Session and IDC, May 23, 2011.
- "Challenging Your Mental Models," Perry Ellis Session, May 17, 2011.
- "Should We Challenge our Mental Models of Creative," FoA Future of Creatives and Creative Ideas in a Digital World, March 18, 2011.
- "Challenging your Mental Models," Discount Bank, Israel, May 25, 2010.
- "Challenging your Mental Models," Mellanox Technologies, Israel, May 25, 2010.
- "Challenging Our Mental Models," Jay H Baker Advisory Board Meeting, November 30, 2009.



- “Challenging the Mental Models of Top Management,” IDC’s CEO Forum, November 19, 2009.
  - “Challenging your Mental Models,” Wharton Combined Boards Meetings, October 23, 2009.
  - “Challenging Your Mental Models,” Partner, June 2, 2009.
- 
- “The Power of Impossible Thinking,” Alumni Leadership Conference, May 24, 2007
- 
- “The Power of Impossible Thinking: Implications for OD,” Organizational Development Network of Greater NYC, October 17, 2006.
  - “Should the Alumni Leadership Challenge their Mental Models?” Alumni Leadership Conference, October 14, 2006.
  - “The Power of Impossible Thinking,” Wharton Staff Workshop, September 12, 2006.
- 
- “Wharton School Publishing and the Power of Impossible Thinking,” Presentation to the Board of the Jay H. Baker Retailing Initiative, October 6, 2005.
  - “The Power of Impossible Thinking,” Opening Session: Transform Your Business with New Thinking and New Models, The 51<sup>st</sup> Annual ARF Convention, Research Powered Marketing: New Models for Growth, April 2005.
- 
- “The Power of Impossible Thinking in Meeting the Jim Stargel Challenge,” ARF Breakthrough Conference, November 4, 2004.
  - “Challenging Your Industry’s Mental Models,” KPMG Global Insurance Institute, December 2003 and November 2004.
- 
- “Disruptive Technology—Rethinking Your Mental Models,” Forbes Global CEO Conference, Singapore, September 2001.

**C. Growth**

- “Growth Rules: Getting to \$2.50,” SEI Growth Forum, May 21, 2013.
- 
- The Changing Business Environment: Key Trends & Growth Opportunities & Their Growth Implications for SEI,” SEI Management Meeting, May 3, 2012.
- 
- “Growth, Interactive Marketing and Business Strategies in the Age of the Empowered Consumer,” Wharton Global Alumni Forum, June 24, 2011.
  - “The Challenge of Ethical Leadership Lessons from ‘Inside Job’,” The Leadership in Film Series, April 20, 2011.
- 
- “Perspectives on the Changing Economy,” AMA Session, February 20, 2010.
- 
- “Profitable Growth Opportunities in times of Crisis and Rebirth,” Jay H Baker Advisory Board Meeting, November 30, 2009.
  - “Opportunities in Times of Crisis,” SEI Center Annual Board Meeting, October 9, 2009.
  - “Opportunities in Times of Crisis,” Baker Retailing Initiative, June 23, 2009.
  - “Member Managed Relationship: Opportunities for Growth,” AAA Management Meeting, June 11, 2009.
  - “Innovation and Creativity in Time of Crisis,” The Israeli Innovation Forum at IDC, May 31, 2009.
- 
- “The Future of the Corporation Survey Results,” SEI Center Board Meeting, November 16, 2006.
- 
- “How Should Directors Think About Directing?” The Governance Summit, October 27, 2005.
  - “Barcelona 2020: Strategic Options and Action Plans,” The Barcelona Group Philadelphia Meeting, July 18, 2005.
  - “Decision Aiding Technologies and the New Theory of the Firm,” with Paul Kleindorfer, Mack Center for Technological Innovation Conference on Using Technology to Improve Decision Making, May 27, 2005.
  - The Silver Lining: Seeing Opportunities in Risk,” Recent Advances in Operations and Risk

Management Conference in Honor of Paul Kleindorfer, May 2005.

- 
- “The Challenge of Corporate Governance,” IAM Conference, Barcelona, Fall 2003.
- 
- “Corporate Transformation: Lessons for Japan,” Marunouchi Global Center First Executive Program, November 2002.
  - “Leading Transformation Lessons for Mexico,” TeleTech’s Top Executive Program, October 2002.
  - “Wharton on the New Reality of Business: Insights from Our Experience,” presentation with Robert Mittelstaedt to the Wharton Combined Boards, March 8, 2002.
- 
- “Capturing Opportunities in the Post 9/11 Reality,” The Wharton Club of Israel, December 2001.
  - “What Keeps Us Up At Night?: Post 9/11 Survey of US CEOs – Top Line Results,” SEI Center Board, October 2001.
  - “Capturing Internet Opportunities Above the Low-Hanging Fruit,” Business Week “Rethinking the Internet,” Conference, Chicago, October 2001.
  - “Making Strategy Happen: Problems, Progress and Proposed Actions for Winning in the Changing Global Information Age,” Li & Fung Distribution Annual Conference, Hong Kong, July 2001.
  - “Globalization of Technology Startups,” Wharton-Israel Global Alumni Conference on the Globalization of Technology Intensive Business, March 2001.
  - “The e-Bus Challenge,” The Top Executives of the Bank of East Asia, March 2001.
  - “Developing a Strategy,” ICA Board, March 2001.
  - “e-Business: The Lessons to Date and Implication to Management Practice, Research and Education,” opening lecture of the PriceWaterhouseCoopers Management Consultants e-Bus Chair at the Graduate School of Business Studies at Katholieke Universiteit Leuven, Belgium, February 2001.
  - “Driving Change: New Business Models for the Global Digital Age,” Opening Lecture of the PriceWaterhouse Coopers Management Consultants, e-Business Chair, Graduate School of Business Chair, Graduate School of Business Studies, Katholieke Universiteit Leuven, Belgium, February 2001.
- 
- “e-Transforming an ‘Old Economy’ Business,” Wharton-Singapore Management University Conference: e-Business in the New Millennium, July 2000.
  - “Creating an e-Business,” Wharton-Singapore Management University Conference: e-Business in the New Millennium, July 2000.
  - “Preparing for Leadership in the Changing e-Business Environment,” CEO Circle, May 2000.
  - “Preparing for Leadership in the Changing e-Business Environment,” CEO Circle, May 2000.
  - “Building Communities,” Virtual Communities and the Internet, April 2000.
  - “Valuation: Valuable or Value Less,” Entering the Virtual Millennium, Wharton North American Regional Forum, April 2000.
  - “Customization Strategies for Financial Services in the Global Information Age,” the Citigroup and Simon Graduate School conference on Electronic Banking Commerce, New York. February 17-18, 2000.
  - “Emerging Trends in the Pharmaceutical Industry and the Expected Scenarios,” Innovative Managed Care Contracting, January 2000.
- 
- “Winning the high Tech Wars: Strategies for Driving Change,” NEC Management Team, Tokyo, April 1998.
  - “The Challenge of Market Leadership,” Bristol-Myers Squibb Medical Devices Group, January 1998
- 
- “Driving Change: Preparing for the 21<sup>st</sup> Century,” Business Writers=Seminar, December 1997.
  - “Preemptive Strategies,” Wharton Executive Education Competitive Marketing Strategies, June 1997.
  - “Toward a New Corporate Governance Model: Lessons from the Japanese and U.S. Experience,” With Masaru Yoshitomi, the Corporate Governance Workshop, March 1997.
  - “Creating a Leading Global Medical Communication Company for the 21<sup>st</sup> Century,” Medicus Group International, Inc., March 1997.

- "The Challenge of Competitive Strategies in the Global Information Age," The Interdisciplinary Center, Herzliya, Israel, December 1996.
- "The Technology Challenges for Family Business," Technology Day: The Web, The Future and You, the 1996 Family Firm Institute Conference, October 1996.
- "Business in the Global Information Age," The Interdisciplinary Center of Business, Law and Technology, December 3, 1995.
- "AHP in Top Management Decisions," The Keynote address of The International Conference on AHP Washington, DC, July 11, 1994.
- "Creating a 21st Century Enterprise," Poon Kam Kai Institute of Management, The University of Hong Kong, June 16, 1994.
- "Market Driven Quality," at the Beyond Quality: Organizational Transformation to the 21st Century Enterprise, March 17-18, 1994.
- "Getting the Most out of Benchmarking," Board of Directors of Wharton's Alumni Association, May 14, 1993.
- Executive Development 1992, 1993.
- "The Market Driven 21st Century Enterprise: Implications for Law Departments," Presentation at the SmithKline Beecham U.S. Law Department Conference on Customer Focus Continuous Improvement, April 28, 1992.
- "Preparing for the 21st Century Today," Securities Industry Institute, 40th Anniversary Program, March 1992.
- "The Successful 21st Century Enterprise as Customer Driven: Implications for Marketing and Management Science," University of Texas at Austin, Faculty Colloquium, February 1992.
- "Management in the 21st Century: Implications to the Fragrance Industry," Summit 2000 Conference of the Fragrance Association, April 8, 1991.
- "Research Priorities in the Information Technology Area," MSI, Information Technology Steering Group, January 18, 1990.
- "Building the 21st Century Corporation Today: A Marketing Perspective," MASTERSHIP, January 9, 1990, Los Angeles, CA.
- "Management in the 21st Century: Implications for Management Research and Education," University of California, Irvine, April 27, 1989.
- "Foreign Market Entry and Import Protection Strategies," Israel Institute of Management, October 1984.
- "The CEO and the Board," Strategic Management Conference, October 1984.

#### **D. Marketing and Branding**

- "Strategic Review," Estee Lauder North America Leadership Meeting, November 15, 2012
- "Perspectives on Marketing Strategy and Financial Performance," 2012 Inaugural AIM-AMA Sheth Foundation Doctoral Consortium, July 28, 2012
- "Assessing the ROI of Marketing Strategy," 2012 Inaugural AIM-AMA Doctoral Consortium, July 28, 2012
- "The Future of Retailing is Now," Li & Fung Retailing Holding Co., July 23, 2012
- "Client Experience and Engagement," SEI Global Wealth Services Executive Network, May 15, 2012.
- "The Future of Branding and Intellectual Property in Marketing: The Challenge" Brands and Branding in Law, Accounting and Marketing Conference at UNC, April 13, 2012.
- "Rethinking Marketing in the Age of the Empowered Consumer," Temple Fox School of Business, March 16, 2012.

- "Conversations with MARS Catalyst & Marketing Lab, MARS, November 8, 2011.
  - "Designing TV Commercials That Maximize Social Diffusion," MARS, November 8, 2011.
  - "The Myth of the Four-Minute Mile and its Implication to B2B Marketing," Google's Think B2B: Deconstructing Today's B2B Customers, October 6, 2011.
  - "Marketing and Business Strategy in the Age of the Empowered Consumer," SEI Private Banking Executive Network, June 16, 2011.
  - "Marketing and Business Strategy in the Age of the Empowered Consumer," Wharton Fellows @ The Conference Board: Fellows Breakfast & Program, June 3, 2011.
  - "MSI- The Philadelphia Story," MSI 50<sup>th</sup> Anniversary, April 26, 2011.
  - "Marketing Communication in the Digital Era," MSI 50<sup>th</sup> Anniversary, April 26, 2011.
  - "Marketing: What's Next," Wharton Fellows at the Conference Board: Philadelphia Master Class, January 22, 2011.
  - "Accelerating & Improving GTM Strategies Via Effective Experimentation," SEI Marketing Group Meeting, January 2011.
  - "Marketing and Business Strategies in the Age of the Empowered Consumer," The Wharton Club of London, February 15, 2011.
- 
- "Getting the Most Out of Your Interactive Marketing Dollars," Wharton Club of Southern California, November 18, 2010.
  - "7 Advertising Myths," Wharton Alumni Webinar, April 22, 2010.
  - "Revitalizing Brands and Reinventing Marketing," SEI, December 14, 2010.
  - "Go To Market Strategies 10 Interrelated Questions" SEI Marketing Leaders Workshop, November 9, 2010.
  - "The Challenge of Customer Centricity", GSK Executive Leadership, November 9, 2010.
  - "Marketing Careers," Wharton Marketing Conference, November 12, 2010.
  - "Marketing of Israel," Gratz College, May 6, 2010
  - "7 Advertising Myths," M Factor, May 5, 2010.
  - "Global Business Branding," America-Israel Chamber of Commerce, April 14, 2010.
  - "Marketing Implications of the Changing Economy," AMA Winter Marketing Conference, February 20, 2010.
- 
- "Leveraging Social Media," The Fox Chase Cancer Center Leadership, December 15, 2009.
  - "Leveraging the PMA's Marketing and Pricing Strategies," A Discussion on Reverse Marketing for the PMA, July 20, 2009.
  - "The Challenge of Marketing Israel," Wharton Alumni Club of Pacific Palisades, July 8, 2009.
  - "Marketing Strategy Discussion Guideline," PhD Seminar, March 27, 2009.
  - "Some Observations on the Changing Retail Scene," The Wharton Retail Club Seminar on Industry Trends, March 18, 2009.
  - "Can We Brand Our Customers and Not Our Products?" MPlanet, January 27, 2009.
- 
- "Market Driven Strategy," and "Integrated Global Marketing Strategy," Newell Rubbermaid Marketing Excellence Program, September 17 and 19, and December 10 and 11, 2008.
- 
- "Rigor & Relevance: A Key Marketing Challenge," The Buck Weaver Award Presentation, September 7, 2007.
  - "Global Branding & Marketing," TEVA Israel Leading Your Business, June 28, 2007.
  - "The Wisdom of Crowds in Today's Digital World We vs. Me," Milken Global Conference, April 23, 2007.
  - "Brand Names and Logos: Implications to Language Instruction," Penn's Language Faculty, March 22, 2007.
- 
- "Customer Value: Strategies for the Long Term," Marketing Precision Conference: The Value of Marketing, September 27, 2006.
  - "Does Korean Marketing Need Reform?" Korean Marketing Club, Seoul, June 5, 2006.
  - "Redefining Marketing for the 21<sup>st</sup> Century," Wharton Club of Korea, Seoul, June 3, 2006.
  - "Brand Names and Logos," Penn Humanities Forum on Word and Image, February 2006.

- "Recent Developments in Marketing and Branding Strategies," IDC Board of Directors Meeting, August 25, 2005.
  - "Effective Marketing Planning: What It Is and How to Produce It," JCCA Conference, April 2005.
- 
- "Strategic Shifts and the Balance of National Security: Summation," J. K. Herzliya Conference, Israel, December 2004.
  - "Return on Marketing Investment: Progress, Problems and Prospects," Address to the CMO Group of the conference board, October 6, 2004.
  - "Challenges of Identifying, Developing, and Capturing Opportunities: A Fresh Look at Marketing," SEI Center Board Meeting, October 1, 2004.
  - "Challenging the Mental Models of Marketing," A State of Marketing Symposium, Does Marketing Need Reform? Boston, August 9, 2004.
  - "Should We Challenge Our Mental Models for Building Better Brands?" Med Ad News Conference on Building Better Brands, Philadelphia, July 28, 2004.
- 
- "The Changing Nature of Marketing: Implications for Research, Teaching, and Practice," The Elsevier Science Distinguished Scholar Award Lecture at the Society for Marketing Advances, November 6, 2003, New Orleans.
  - "The Interdisciplinary Challenge of Marketing," Ph.D. Proseminar, February 2003.
  - "Convergence Marketing: Strategies for Reaching the New Hybrid Consumers," a Webcast of the University of Wisconsin Consortium for Global e-commerce, January 2003 and a Soundview Teleconference, May 2003.
- 
- "Managing the Complexities of the Convergent and Multi-Channel Marketing," CMO Summit, October 30, 2002.
  - "Marketing Driven Strategies for Today's Economy," presentation at Alumni Weekend, May 2002.
  - "Pioneer and Late Entrants: Winning Strategies," Viagra, Cardura, Darifenacin WWT Meeting, April 9, 2002.
  - "The Interdisciplinary Challenge of Convergence Marketing," Wharton Ph.D. Proseminar, March 8, 2002.
  - "Marketing Driven Strategies in a Global Economy," IBM's Managing Director's Executive Development Program, February 13, 2002.
  - "Should You Have a Chief Marketing Officer?" January 2002.
  - "Convergence Marketing: The Challenge for the On-Demand Era," IBM's 2002 WW Summit for the On-Demand Era, 2002.
- 
- "Target Audience, Public Opinion and Foreign Policy – A Marketing Perspective," Balance of National Strength and Security – The Herzliya Conference, December 2001.
  - "The 5 Cs of Marketing: Capitalizing on the New Opportunities of Convergence Marketing," The Wharton Club-Atlanta, GA, November 2001.
  - "Advances in Customer Focused Marketing and Business Strategy: The 5 Cs of Convergence Marketing," The International Academy of Management, Claremont Graduate University, November 2001.
  - "Convergence Marketing: A New Marketing Strategy for the Global e-Business Environment," The Wharton European Forum, May 2001.
- 
- "Whither System Thinking: Will Taking a Marketing Perspective be an Oxymoron?," Inaugural Conference of the Achoff Center for Advanced Systems Appraisal, September 2000.
  - "New Marketing Rules for e-Business Success," UNIG, Singapore, August 2000.
  - "New Marketing Rules for the Global Information Age," IBM Global Services Academic Conference, August 2000.
  - "Marketing Driven Business Strategy in the Global Information Age," Managing Change in the New Millennium, Wharton-Singapore Management University Conference, July 2000.
  - "A New Marketing Paradigm for the Global e-Business Environment: A Catalyst for Bridging the Gaps," Building Bridges & Broadening Perspectives: A Paradigm for the Next Millennium, 29<sup>th</sup> EMAC Conference, Rotterdam, May 2000.

- “Research Priorities in e-Commerce and Internet Marketing,” Web Consortium, Pennsylvania State University’s ISBM, March 2000.
  - “Implications of the New e-Business Environment and Models for Management Research and Education,” International Academy of Management, Barcelona Meeting, March 2000.
  - “Marketing Driven Business Strategy in the Global Information Age,” Studio Ambrosetti’s top executive seminar in Padova and Milan, March 2000.
  - “New Trends in Marketing Research,” IDC, Herzliya, March 2000.
  - “Digital Marketing: Towards a New Paradigm for the Global Information Age,” Faculty Session- INSEAD, France, June 2000.
  - “The Future of the Marketing Organization,” The Future of the Marketing Organization, MSI Board of Trustees Meeting, Cambridge, Massachusetts, April 2000.
- 
- “Towards a Research Agenda in E-Commerce and Internet Marketing,” AMA Educators’ Conference, San Francisco, August 1999.
  - “Digital Marketing: Implication for the Future of Marketing Management Research and Research in Marketing,” plenary session presentation AMA Marketing in the 21<sup>st</sup> Century, San Francisco, August 1999.
  - “Marketing Strategy in the Global Information Age: Implications for Research and Modeling,” PhD. And Faculty Seminar IESE Universidad de Navarra, Barcelona, March 8, 1999.
  - “Implementation and Feasibility Issues of New Forms of Organizations: A Marketing Perspective,” Wharton Impact Conference, March 1999.
  - “A Marketing Perspective on Communitarian Policies,” The Communitarian Summit, Washington, D.C., February 28, 1999.
- 
- “An Extended Marketing Perspective on Corporate Architecture for the 21<sup>st</sup> Century,” Japan Marketing Association, World Marketing Conference, Tokyo, April 1998.
  - “The Challenge of Customer-Driven Product and Service Customization,” Senior management of Convatec, March 1998.
  - “Towards a New Marketing Paradigm,” AMA Winter Marketing Educators’ Conference, February 1998.
  - Towards a New Marketing Paradigm,” AMA Winter Marketing Educators=Conference, February 1998.
  - “Positioning and Segmentation in the Global Information Age,” IMS Marketing Management Meeting, January 1998.
- 
- Competitive Marketing Strategies, “Preemptive Strategies,” 1997, 1998.
  - “Positioning and Segmentation Opportunities for Synergy and Growth,” Cognizant Group’s Marketing Council, July 1997.
  - “Integration of Marketing and other Business Functions: The Wharton Experience,” AMA: 1997 Faculty Consortium B Chicago, August 1997.
  - “Communicating and Marketing Your Excellence,” Volunteer Committees of Art Museums - VCAM Conference, Philadelphia, April 1997.
  - “The Challenge of Information Technology to Marketing and Retailing in the 21<sup>st</sup> Century,” University of Tokyo, April 1997.
  - “Marketing Strategy in the Global Information Age: Implications for Modeling and Research,” Ph.D. Proseminar, March 1997.
- 
- “Marketing: The State of the Art,” Conference of the 2nd International Workshop on Economics and Management, Santiago, Chile, October 1996.
  - “Creating a 21<sup>st</sup> Century Enterprise: Implications for Marketing Practice, Research and Education,” Keynote Address, 2nd International Workshop on Economics and Management, Santiago, Chile, October 1996.
  - “Marketing Strategy in the Global Information Age: Implications for Research and Modeling,” AMA 1996 Doctoral Consortium, July 1996.
  - Segmentation in the Global Information Age: Accomplishments, Problems and Challenges,” The 1996 Converse Award Presentation, May 7, 1996.
  - “Advances in Marketing,” Janssen Pharmaceutica, April 18, 1996.

- 
- "Marketing Issue in the Global Economy," Wharton Doctoral Consortium, August 11, 1995.
  - "A View of Marketing Through the Prism of the 1977 and 1995 Doctoral Consortia," Wharton School, Doctoral Consortium, August 8, 1995.
  - "Toward a New Marketing Paradigm," Ambrosetti Group's A.F. Meeting (Rome, Italy), March 8, 1995.
  - "Toward a New Marketing Paradigm: Lessons From and Implications to the Marketing of Services," Ambrosetti Group's Chief Executive Seminar (Milan, Italy), March 7, 1995.
  - "Marketing in the Pharmaceutical Industry: Emerging Challenges and Opportunities," P.A.C. Pharmaceutical Meeting: New Thinking, New Customers. February 28, 1995.
  - "Beyond Brand Management," Wharton MBA Marketing Club, January 23, 1995.
  - "The Value of Marketing Program," Janssen Pharmaceutica, January 9, 1995.
- 

- "Research Priorities in Marketing as Derived From the SEI Center for Advanced Studies in Management Work on Creating Successful 21st Century Enterprises," Doctoral Proseminar, November 16, 1994.
  - "Entering the U.S. Consumer Durable Markets," Nijenrode Executive MBA Program, August 4, 1994.
  - "The Challenge of a New Marketing Paradigm," University of Texas at Austin, March 23, 1994.
  - "Creating a Successful 21st Century Enterprise: Implications for Business and Marketing Theory, Practice, Research and Education," The University of Tokyo, November 4, 1994
  - "The Marketing Challenges for the Philadelphia Orchestra," Presentation to the Board of Trustees of the Philadelphia Orchestra, March 1, 1994.
  - Re Engineering Pharmaceutical Marketing, 1994.
  - Is Your Marketing Obsolete? Implications of the New Marketing Paradigm for Business and Non-profit Organizations," YPO Philadelphia Chapter University, The Cloister, September 1994.
  - "The Value of Marketing: A Research Agenda," Value of Marketing Conference, Stanford University, August 9, 1994.
  - Determining the Value of Marketing: A New Challenge to the Discipline," San Francisco AMA Conference, August 8, 1994.
  - "Electronic Commerce: Progress and Prospects," AMA Conference, San Francisco, August 8, 1994.
  - "Advances in U.S. Marketing and Their Implications to China," Joint faculty seminar of the School of Economics and Management, Tsinghua University and the School of Management, Peking University, June 15, 1994.
  - "Toward a New Marketing Paradigm," a faculty seminar at the Hong Kong University of Science and Technology, School of Business and Management, June 14, 1994.
  - "Empirical Generalizations in Marketing: Opportunities for MSI Research Program," MSI Board of Trustees Meeting, April 29, 1994.
  - "Empirical Generalizations in Marketing: Some Observations," Wharton Conference on Empirical Generalizations in Marketing, February 16-18, 1994.
  - "Increasing Marketing Effectiveness," Executive Conference of Schering-Plough Int., January 18, 1994.
- 

- "The Value of Pharmaceutical Advertising and Promotion," Coalition of Healthcare Communication Conference, Marketing Conference in an Era of Change, New York October 27, 1993.
  - "Advances in Marketing Strategies," Nijenrode University Executive Program, August 6, 1993.
  - "Global Consumer Brand Strategies: Problems and Prospects," Seminar for the Business Partners of the Norwegian School of Management, June 11, 1993.
  - "Marketing Opportunities in Japan and East Asia," with Hotaka Katahira and the International Forum Participants, April 18, 1993.
  - "Toward a New Marketing Paradigm: Implications for Marketing Departments," Advisory Board Meeting of the Wharton's Marketing Department, April 8, 1993.
- 

- Third Workshop on Marketing and Competitive Advantages with Ambrosetti Group, Milan on "The Customer Driven Company: From Concept to Reality," November 27-28, 1992.
- "The Strategic Impact of Market Driven Quality," with Paul R. Kleindorfer. ORSA/TIMS, San Francisco, Session on Customer Satisfaction and its Role in Global Competition. November 1992

- "Marketing Skills and Strategies for the 1990's," Pfizer International Marketing Managers, December 1989, Lambertville, NJ.
  - "Competitive Advantage Through Strategic Marketing," Contel Corporation, October 1989, Lake of the Ozarks, MO.
  - "The Contributions of Strategy and Other Business Functions to the Creation of Innovative Marketing Knowledge," AMA Marketing Educators Conference, Chicago, August 1989.
  - "Strategic Marketing," Studio Ambrosetti AP Milan Group, May 17, 1989.
  - "The Marketing Challenge for Top Management: Promises and Pitfalls of Expert Systems," University of California, Irvine, April 27, 1989.
  - "A Contrarian Approach to Effective Pricing," The Pricing Institute, March 7, 1989, New York.
  - "Achieving Competitive Advantage in Marketing," Securities Industry Association, March 6, 1989, Philadelphia, PA.
- 
- "Courtyard by Marriott: Designing a Hotel Facility with Consumer Based Marketing Models," presented to the TIMS/AMA seminar Marketing Science: A Developmental Tool for Management Scientists, New York, November 16, 1988.
  - "Technology and Marketing-Driven Global Portfolio of R&D Projects," with Robert DeLuccia presented at the ORSA/TIMS Joint National Meeting in Denver, Co, October 26, 1988.
  - "Pitfalls and Challenges of Global Marketing," Second International Conference on Marketing and Development, Karl Marx University, Budapest, Hungary, July 12, 1988.
  - "Information Technology and Marketing Strategy," with Eric Clemons, presented at IS, TC and Strategy Plenary Meeting, January 1988.
- 
- "A New Challenge for Human Resource Management: Incorporating a Marketing Perspective," The Lauder Institute: International Human Resource Conference, December 1987.
  - "Advances in Marketing Strategy and Research," Wharton Alumni Club, Milan, October 1987.
  - "Marketing and Corporate Strategy," Studio Ambrosetti, Milan, October 1987.
  - "Marketing for Financial Institutions," Studio Ambrosetti, Milan, October 1987.
  - "Proactive Marketing Research and Modeling: Pitfalls and Prospects," PMRG Fall 1987 meeting, Captiva Island, Florida, October 1987.
  - "Turning Salespeople and Non-Marketing Executives into Marketing Strategists," AMA Marketing Educators' Conference, Toronto, August 1987.
  - "International Marketing," Wharton Alumni Club, Toronto, August 1987.
  - "Marketing and Technology: Progress, Problems, and Prospects," European-American Symposium, Enschede, The Netherlands, June 29-July 1, 1987.
  - "Market Segmentation: Shortcomings and Opportunities," 1987 Attitude Research Conference, West Palm Beach, Florida, May 1987.
- 
- "Advances in Management Strategy: A Marketing Perspective," The Institute of Management Consultants, March 1986.
  - "Advances in Global Marketing Strategy: Concepts, Methods, and Applications," International Symposium on Recent Developments in Management Research, Helsinki, Finland, 1986.
  - "The Marketplace of the Future: Global Consumers," Advertising Research Foundation 50th Anniversary Conference, March 1986.
  - "A Marketing Perspective for Public Management: Research Implications," Wharton Department of Public Policy and Management Brown Bag Seminar, January 1986.
- 
- "Marketing to the U.S." A special meeting of the Chinese Management Association and the Taiwan Ministry of Trade, (Taipei), July 1985.
  - "Advances in Portfolio Analysis and Strategy," Chinese Management Association, Taipei, July 1985.
  - "New Development in Marketing and Planning," WEFA/Lauder Seminar, June 1985, Tokyo, Japan. Sessions on Advances in Market Segmentation, Product Positioning and Portfolio Analysis and Strategy.
  - "Advances in Portfolio Analysis and Strategy," University of Illinois, Theories of Marketing Practice Conference, May 1985
  - "Micro Computers in Marketing," Marketing Science Conference, March 1985.



- "Global Marketing Strategies," New York University, 1985.
- "Diffusion Models: The State of the Art," ASA conference, 1984.
- "Generating and Evaluating Industrial Marketing Strategies Using the AHP," TIMS Conference, November 1984;
- MRCA Conference on "The Affluent Market: New Data and Methodologies in Financial Services Planning," November 1984.
- "Increasing Marketing Productivity," S.F. Chapter of the AMA, March 1982.
- "Advances in Segmentation," Philadelphia Chapter of the AMA, Conference on Market Segmentation, January 1981.
- "Marketing Strategy," Delaware Valley Hospital Strategic Planning Program, May 1980.
- National Agricultural Marketing Association, Philadelphia, March 1977 and February 1978.
- Marketing Planning Conference, The AMA Western Michigan Chapter, Grand Rapids, March 1976

## **E. The Network Challenge**

- "Surviving & Thriving in a Hyper-Connected World: An Ideal Design," WEF Risk in a Hyper-connected World Project, November 13, 2011.
- "From Firm Centric to Network Orchestration," MARS, November 8, 2011.
- "The Network Challenge," SEI Connections Conference, June 8, 2010.
- "Organizational Networks for Effective Competition," Tyco, February 4, 2010.
- "The Network Challenge," SEI PB&T Management Team, November 9, 2009.
- "The Network Challenge," SEI Center Annual Board Meeting, October 9, 2009.
- "Wharton Combined Boards Meeting Spring 2009 Opening Plenary Session," Wharton Combined Boards Meeting, April 2, 2009.
- "Competing in a World of Network Orchestration: Implications For Marketing," MPlanet, January 27, 2009.
- "Network Orchestration and Open Innovation Models," SEI Center Board Meeting, November 7, 2008.
- "Making Your Way in the New Flat World Economy," CASRO International Research Conference, May 6, 2008.
- "Competing in a Flat World," Wharton Club of NY, February 5, 2008.
- "Network-Based Strategies and Competencies," SEI Center Board Meeting, November 16, 2007.
- "Network Orchestration: Core Competencies for a Borderless World," Wharton-INSEAD Impact Conference: Network-Based Strategies and Competencies, November 9, 2007
- "Network Orchestration," Network-Based Strategies & Competencies Workshop, May 3, 2007.
- "Succeeding in a Flat World," The Wharton Economic Summit, Philadelphia, April 12, 2007.
- "Web 2.0 & Social Networking: Implications for Management," The Worldwide J&J Diabetes Franchise Leadership Team, January 3, 2007.
- "The Changing Nature of Corporations: Competing in a Flat World," organizer and chair of a panel at the Milken Institute Global Conference, April 2006.
- "An Extended Example of New Risks and their Management in Supply Chains," SEI Meeting, September 26, 2005.
- "Assessing Vulnerabilities," System Approaches to Terrorism Conference at George Washington University, July 15, 2002.

- “State of the World: Trades, Problems and Prospects,” YPO Philadelphia Chapter University, The Cloister, September 1994.
- “Selecting and Negotiating International Strategic Alliances: Applications of the AHP,” TIMS Osaka, July 1989.

## **F. Future of Advertising**

- “Advertising and Media 2020: Implications for Action,” Cannes Lions Young Media Academy, June 19, 2013
- “The New Frontiers of Retailing,” Fung Group Idealized Workshop, May 29, 2013.
- “Creating an Agile and Innovative Organization: Lessons from the FoA Program,” Strategic Agility & Innovation Workshop, IDC Herzliya, June 17, 2013.
- “Innovative Approaches to Measuring Advertising Effectiveness,” Wharton Future of Advertising Program and Wharton Customer Analytics Initiative, May 16, 2013.
- “Insights from Advertising 2020,” ARF Webinar, May 9, 2013.
- “Insights from Advertising 2020,” ARF Re:think: Unparalleled Knowledge, Unparalleled Networking, March 17, 2013.
- “Facebook Roundtable,” Wharton Future of Advertising Program, January 18, 2013.
- “The Implications of Advertising 2020,” ARF Rethink 2013. March 19 2013,” Wharton Future of Advertising, January 18, 2013.
- “The Future of Advertising Program; Global Insight Roundtables: China,” Beijing, July 25, 2012
- “What’s Next for Empirical Generalizations in Advertising,” Empirical Generalizations in Advertising II: What works in the New Age of Advertising and Marketing, June 1, 2012.
- “The Secrets of Viral Ads” Post-Advertising Summit Story Worldwide, March 29, 2012.
- “Rethinking Marketing and Advertising Research,” Future of Advertising Global Advisory Board Meeting, December 9, 2011.
- “Toward a New Mental Model of Advertising: Implications to Orchestration, Business & Revenue Models,” FoA Orchestration Session, October 27, 2011.
- “The Future of Brand Building and Brand Experience: Blurring Boundaries Between Advertising and Retailing,” Workshop Session with the Jay H. Baker Retailing Initiative, April 21, 2011.
- “The Future of Sports Advertising,” WSBI Alumni Advisory Committee Mtg, April 7, 2011.
- “The Future of Marketing & Advertising: An opportunity for Preeminence,” Wharton External Affairs Director’s Meeting, March 21, 2011.
- “The Future of Sports Advertising, Innovations and Experiments with Multi Touch Point Portfolios,” Leverage Sports Agency, March 16, 2011.
- “The Future of Advertising, The Wharton Club of London, February 18, 2011.
- “The Future of Advertising is Now,” IESE, May 17, 2010.
- “Future of Advertising,” Future of Advertising Project Global Advisory Board Working Session, March 10, 2010.
- “Future of Advertising: Progress and Prospects,” Board Meeting of Ehrenberg-Bass Institute, November 10, 2009.
- “The Future of Advertising Project and The New Marketing Challenges,” SEI Center Annual Board Meeting, October 9, 2009.
- “The Future of Advertising Project (Project Update),” Future of Advertising Project Global Advisory Board Meeting, October 8, 2009.
- “What We Know about Advertising: Implications for Management and Measurement,” Audience Measurement 4.0, June 24, 2009.
- “Empirical Generalizations in Advertising: What We Know, Don’t Know, Can’t Know, and Should Know,” Rethink The ARF Annual Convention, March 31, 2009.

- “Taking Stock of Existing Advertising Empirical Generalizations,” Wharton Impact Empirical Generalizations in Advertising Conference, December 4, 2008.
- “The Future of Advertising if NOW: Project Overview and Update,” SEI Center Board Meeting, November 6, 2008.

- 
- “The Future of Advertising,” SEI Center Board Meeting, November 16, 2007.

### **G. Future of Management & Management Education**

- “Israel Knowledge@Wharton: Implications,” Israel Knowledge@Wharton Launch Event and Working Forum, October 12, 2012

- 
- “Managing Change in Higher Education: Challenges, Approaches & Action Plans,” NACUBO Conference on Managing Change, September 30, 2011.

- 
- “Management Education 2020”, Wharton Combined Boards Meeting, October 15, 2010.

- 
- “Reinventing Management Education,” SEI Center Annual Board Meeting, October 9, 2009.
  - “Socially Responsible Capitalism Approaches to Improving Business and Government Relations,” SEI Center Annual Board Meeting, October 9, 2009.
  - “Future of Management and Management Education,” SEI Center Annual Board Meeting, October 8, 2009.
  - “The Financial Crisis and the Changing Relationship between Business and Government,” Chiefs of Staff Meeting, September 15, 2009.

- 
- “Approaches for Redesigning the Total Wharton Experience,” The Wharton School, May 15, 2009.
  - “Challenging the Current MBA,” January 1, 2008.

- 
- “Thought Leadership,” The Wharton Economic Summit, April 12, 2007.
  - “The Future of Management Education,” International Academy of Management @ IMD, March 22, 2007.
  - “The Future of Management Education,” International Academy of Management @ IMD, March 16, 2007.

- 
- “Perspectives on Research: Innovation, Impact, and Fun,” The Joseph Wharton Scholars Senior Research Seminar, October 11, 2006.
  - “Reinventing the MBA,” Panelist at the MBA Roundtable Session on MBA 2020: Curricular Innovation for Tomorrow’s Business School,” October 6, 2006.
  - “New Frontiers in the Practice of Management” with Paul Kleindorfer, CEO Workshops at IDC Israel, February 2006.

- 
- “Toward a New Theory of the Firm,” SEI Center Board Meeting, October 7, 2005.
  - “The Lauder Institute: 1984-2005: A Reexamination,” The Lauder Institute, July 12, 2005.

- 
- “e-Bus: The Curriculum and Research Challenge: A Discussion with Jerry Wind,” Faculty Seminar, Graduate School of Business Studies, Katholieke Universiteit Leuven, Belgium, February 2001.
  - “Reinventing Training for the Global Information Age,” Delphi e-Learning Conference, January 2001.

- 
- “Creating a University for the Global Information Age,” The Inaugural Lecture of the Wharton-Singapore Management University, July 2000.
  - “Reinventing the Business School for the Global Information Age,” plenary session, The EFMD Deans and Directors Meeting 2000, Helsinki, Finland, January 2000.

- 
- “The Information Revolution and the Emerging Management Education Paradigm,” On Line Educa, Berlin, December 1998.
  - “Towards a New Management Education Paradigm,” IDC Faculty Workshop, June 1998.

- -----
- "Choices and Strategies for Universities in the Global Information Age," Provosts Seminar on Information, February 1997.
- -----
- "Creating a 21st Century Enterprise," Universidad Adolfo Ibanez, Vina del Mar, Chile, October 1996.
- "Creating a 21st Century Enterprise: Implications for Boards of Directors," Enhance Board of Directors, September 1996.
- "The Stakeholder Challenge for Increased European Competitiveness," Wharton European Forum, (London, England), March 29, 1996.
- "The Next Enterprise: Creating a Successful 21st Century Enterprise Today," The Hong Kong Management Association, January 12, 1996.
- -----
- "Toward Virtual Management Education," International Academy of Management (Boston, MA), December 8, 1995.
- "The Virtual University: Research and Action Agenda," The Virtual University Conference, SEI Center, January 12, 1995.
- -----
- "A New Management Paradigm for the 21st Century Enterprise," Conference of the International Academy of Management, December 9, 1994.
- "Textbook of the Future: A Perspective From the Virtual University Lab," April 8, 1994.
- Neuhauf Lecture, "The Impact of Marketing Science on Industry and Academia: Applications, Results and Lessons," at Rice University, March 23, 1994.
- "Role of Marketing in the New MBA Curriculum: Lessons from the Wharton Experience," AMA Winter Conference, February 21, 1994.
- -----
- "The New Wharton MBA Curriculum," Faculty seminar at Erasmus University, March 10 and June 10, 1993.
- -----
- "Designing & Implementing an Innovative MBA Program: Lessons from the Wharton Experience," Conference on the Future of Management Education in Israel, Jerusalem, Israel, October 16, 1991.
- -----
- "The Globalization of Management Education: Options, Trade-Offs, and an Agenda for Implementation," AACSB Annual Meeting, April 18, 1989, Montreal.
- -----
- "Management Education in a Global Context," University of Pennsylvania Conference on Management Education and Foreign Languages, December 1984.

#### **H. Marketing Demand & Experimental Model SKAN**

- "The Changing Role of Marketing Research," 2012 Inaugural AIM-AMA Sheth Foundation Doctoral Consortium, July 29, 2012
- -----
- "Marketing Research in Times of Crisis," Navigating a New World Conference hosted by Greater NY and Phila Marketing Research Association, April 16, 2009.
- -----
- "Online Panels: Where We Are Today and in the Future," CASRO, June 22, 2007.
- -----
- "Adaptive Experimentation" The Sammy Ofer School of Communications and Information," IDC Herzliya, September 9, 2005.
- -----
- "Research Challenges in the Management of Extreme Events: The Case of the Office Homeland Security," with Paul Kleindorfer, Advisory Board Meeting of the Wharton Managing and Financing Extreme Event Project, December 2001.
- -----
- "Marketing Science: Accomplishments and Challenges in the Global Information Age," Informs, November 1999.

- “Marketing Research in the Global Information Age: Practice, Problems, and Prospects,” Wharton-IDC Marketing Communications Program, March 1999.
- 
- “Creative Joint Ventures and the Potential Role of the University,” Philadelphia-Israeli Chamber of Commerce, June 1997.
- “The Use of Conjoint Analysis-Based Survey to Determine Consumer Price Elasticities,” Debriefing Session for the Anti-Trust Division, Washington, D.C., February 1997.
- 
- Address on Issues in Marketing Research for Legal Cases: Necessity of Using controls and the Propriety and Risk of Repetitive Probes,” Marketing and Public Policy Conference, Washington, D.C., May 1996.
- 
- “Marketing Science at a Crossroad,” Inaugural Presentation as the first holder of the Unilever-Erasmus Marketing Professorship, Erasmus University, February 18, 1993.
- 
- “Time Based Competition: Implications for Marketing Science,” INSEAD Faculty Presentation, January 1992.
- 
- “Marketing Research and Modeling for the 21st Century Enterprise: The Emerging Crisis and its Challenges,” Management Science Roundtable, February 17, 1991, Redington Beach, FL.
- 
- “Concept Testing for Generating and Evaluating Positioning Strategies,” PDMA Positioning Conference, March 6, 1990, New York, NY.
- 
- “Second Generation Expert Systems: Incorporating Enhanced Explanation and Learning,” Marketing Science Conference, Jouy-en-Josas, France, June 24-26, 1987.
- 
- “Advances in Marketing Research and Modeling,” Studio Ambrosetti, Milan, December 1986.
- “Expert Systems in Marketing,” TIMS October 1986 Conference, Miami.
- 
- “The Contribution of Consulting to the Consumer Research Discipline,” ACR conference, October 1984.

**I. Israel**

- “Getting the Most from your Israel Visit,” 2012 Faculty International Seminar to Israel/Turkey, April 25, 2012.
- “Israel: Insights and Opportunities: Background Discussion for GIP Israel Program,” GIP Israel Program, November 16, 2010.
- “Making the Case for Israel,” IDC Panel Discussion, Israel, May 26, 2010.
- 
- “The Challenge of Marketing Israel,” Israeli MBA Conference, April 19, 2009.
- 
- “A New Management Paradigm for Israel's Schools of Management: Lessons from the New Wharton MBA Curriculum,” Conference on the Future of Management Education in Israel, Jerusalem, Israel, October 16, 1991.

## 6. PROFESSIONAL AFFILIATIONS AND AWARDS

### I. Professional Affiliations

1. Fellow of the International Academy of Management (since 1989), Chancellor 2000- , Vice Chancellor for the Americas, 1996-2000
2. Academy of International Business
3. American Marketing Associations
4. American Association for Public Opinion Research
5. American Psychological Association, Division of Consumer Psychology (Div. 23)
6. Association for Consumer Research
7. International Communication Association
8. Product Development and Management Association
9. Psychometric Society
10. Strategic Management Society
11. INFORMS – The Institute of Management Sciences
12. The Market Research Society (London)

### II. Professional Awards

#### 1. Honorary Degrees

M.A. Honors, University of Pennsylvania, 1971

#### 2. Awards

- One of the 10 **Legends of Marketing, 2009**. An 8-volume set of anthologized work forthcoming from Sage, 2013.
- **Buck Weaver Award**, Massachusetts Institute of Technology, 2007.
- **Honorary Fellow of the Decade**, Interdisciplinary Center, Herzliya (Israel), May 2004.
- The **2003 Elsevier Science Distinguished Scholar Award** of the Society for Marketing Advances
- One of the **10 Grand Auteurs** in Marketing. [Alain Jolbert, EMS Management and Societe, 2000]
- One of 18 **JAR** articles in the Special Classics Issue **of articles that have withstood the test of time**. Nov./Dec. 2000.
- **The Paul D. Converse Award**, 1996.
- **American Marketing Association/Irwin Distinguished Educator Award**, 1993.
- **First Faculty Impact Award**, Wharton Alumni Association, 1993.
- First Runner-Up in the **1988 Franz Edelman Award for Management Science/Achievement**.
- **The 1985 Charles Coolidge Parlin Award**.
- Elected as the 1984 member of the **Attitude Research Hall of Fame**.
- Delivered the 13th (1981) **Albert Wesley Frey Lecture**, University of Pittsburgh.
- My *Product Policy* book won the **1979 Book of the Year Award** given by the editors of Expansion (Mexico).
- Winner of two **Alpha Kappa Psi Foundation Awards** for the best article published in the *Journal of Marketing* in 1973 and 1976.
- Runner up of the 1983 **William O'Dell Award** for "the article published 5 years earlier in JMR which stood the test of time and made the most significant long run contribution to Marketing Theory, methodology and practice".
- **Winning paper** (with Paul E. Green) of American Psychological Association Division of Consumer Psychology, 1972 Research Design Competition.
- A finalist (top 5) for the 1980 Wharton Award for teaching excellence.

#### 3. Illustrative Citations

- Third highest ranked Marketing Scholar in the University of Maryland's Kirkpatrick and Locke Faculty Scholarship Study, 1985 (based on number of publications, citations, and peer ratings).
- 10th highest ranked marketing Scholar in the Cote, Leong and Cote "Assessing the Dissemination

and Utilization of Marketing Research in the Social Sciences: A Citation Analysis Approach,” 1990.

#### 4. Illustrative Research Grants

- National Science Foundation: U.P. Research Grant (Summer 1970);
- General Foods, the Jell-O Division (1971);
- N.W. Ayer (1972) - (with Paul E. Green);
- Downe Communication, Inc. (1972);
- Lever Brothers (1972) - (with Paul E. Green);
- Thomas Jefferson University Hospital (1973);
- AT&T (1973);
- The Robert Wood Johnson Foundation Clinical Scholar Fund (1974);
- The John and Mary R. Markle Foundation with R.E. Frank (1975-1976);
- National Science Foundation (Grant No. 51575-12928) (1975);
- The National Health Care Management Center of the Leonard Davis Institute with Thomas Robertson (1977).
- Wharton Global Initiatives Research Program (2010)
- Wharton Sports Business Initiative Program (2010)

#### 5. Fellowships

- Hebrew University Awards 1959/1960; 1964/1965; 1965/1966;
- Ford Foundation Fellowship 1963/1964;
- Owen D. Young: General Electric Fellowship in Marketing 1964/1965; 1965/1966;
- Bankendorf Fellowship 1964/1965;
- Stanford University Fellowship 1964/1965; 1965/1966.

#### 6. Illustrative Recent Media Coverage

- Knowledge@Wharton:
  - The U.S. Demographic Shift: A 'Tipping Point' for Marketers [May 22, 2012]  
<http://knowledgetoday.wharton.upenn.edu/2012/05/the-u-s-demographic-shift-a-tipping-point-for-marketers/>
  - Putting the Squeeze on Consumer Choice [September, 23, 2011]  
<http://knowledgetoday.wharton.upenn.edu/2011/09/putting-the-squeeze-on-consumer-choice/>
  - Harnessing Networks to Create Value and Identify New Opportunities [July 15, 2009]  
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=2289&specialid=88#>
  - What Does it Take to Compete in a Flat World? [October 31, 2007]  
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1836>
  - Can't Run, Can't Hide: New Rules of Engagement for Crisis Management [September 19, 2007] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1807>
  - Will a New Theory Help Firms to Manage in a 'Flat' World? [October 25, 2006]  
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1588>
  - Business Books for the Beach, The Power of Impossible Thinking [March 22, 2006]  
[http://knowledge.wharton.upenn.edu/special\\_section.cfm?specialID=22](http://knowledge.wharton.upenn.edu/special_section.cfm?specialID=22)
  - Farewell, Peter Drucker: A Tribute to an Intellectual Giant [November 30, 2005]  
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1326>
  - Should Your Next CEO Be a Philosopher? [interview, February 9, 2005]  
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1125>
  - What's the Buzz About Buzz Marketing? [interview, January 12, 2005], reprinted in *Wharton Alumni Magazine*, Winter 2005  
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1105>
  - Amazon's Multiple Personalities [interview, January 14, 2005]  
<http://knowledge.wharton.upenn.edu/article.cfm?articleid=1088>
  - Back to the Drawing Board: Is the Traditional Theory of the Firm Obsolete? [interview, October 6, 2004] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1047>
  - The Power of Impossible Thinking [book, August 25, 2004]

- <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1022>
- What's Behind the 4-Minute Mile, Starbucks, and Moonlanding? The Power of Impossible Thinking [book, July 14, 2004]
- <http://knowledge.wharton.upenn.edu/article.cfm?articleid=1007>
- A Lofty Take on Leadership: Mountain Climbing and Managing Companies [book, September 24, 2003] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=858>
- How Business Can Prepare for War [conference, February 9, 2003]
- Could a Cyber-Terrorist Take Down Your Company? Don't Wait to Find Out [conference, August 28, 2002] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=615>
- The New Business Reality [conference, January 30, 2002] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=509>
- What Webvan Could Have Learned from Tesco [interview, October 10, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=448>
- What's in Store for Capital Markets and the Economy? [interview, September 26, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=436>
- Did Terrorists Blow Up the Recovery? [interview, September 13, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=425>
- Dotcom Bomb Hits the Publications that Covered It [interview, August 29, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=418>
- Can Priceline Remain Profitable? [interview, August 15, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=412>
- Good vs. Great Leaders: The Difference is Humility, Doubt, and Drive [conference, June 20, 2001] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=377>
- It's Not Easy Being Paul Green [interview, November 8, 2000] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=262>
- Three Marketing Lessons from the Love Bug [interview, May 24, 2000] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=184>
- Just-in-Time Education: Learning in the Global Information Age [paper, August 30, 2000] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=236>
- New Rules of Digital Marketing [interview, October 13, 1999] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=79>
- Who's Buying on the Internet? [paper, September 1, 1999] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=63>
- Marketing Strategy in the Global Information Age [lecture, July 23, 1999] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=36>
- The Knowledge Edge [conference, June 23, 1999] <http://knowledge.wharton.upenn.edu/article.cfm?articleid=34>
- Knowledge @ Wharton, High School Edition [glossary of various marketing terms]
- "Has Johnson & Johnson lost its way?" *Leader*, August 1, 2012 <http://www.leader.co.za/article.aspx?s=1&f=1&a=3843>
- "Facing Up to Change: The Executive Challenge," *iedp.com*, July 13, 2012 [http://www.iedp.com/Blog/Wharton\\_Fellows\\_Keep-Up\\_Deal\\_with\\_Change](http://www.iedp.com/Blog/Wharton_Fellows_Keep-Up_Deal_with_Change)
- "6 Steps to Achieving Creativity in Business, Personal Life," *US News and World Report*, January 3, 2011. <http://health.usnews.com/health-news/family-health/brain-and-behavior/articles/2011/01/03/6-steps-to-achieving-creativity-in-business-personal-life.html>
- "Wharton's Jerry Wind Predicts the Future of Advertising," *IESE Insight*, May 19, 2010. <http://www.iese.edu/aplicaciones/news/view.asp?id=2333&lang=en>
- Interviewed in report on the *Future of Advertising Project*, *VMarketing China Magazine*, April 2010.
- Listing of *The Network Challenge: Strategy, Profit, and Risk in an Interlinked World* in "KYW News Radio 1060 AM's 10 Books to Read by Marc Kramer." November 1, 2009.
- "World Series a marketing windfall for Philadelphia," *Philly.Com*, October 27, 2009. <http://www.philly.com/philly/business/66284122.html>
- Media coverage of Fast.Forward (<http://www.youtube.com/user/FastForward>), the Marketing Channel on YouTube co-founded with Google:
  - "Truth in Advertising," *Penn Gazette*, September, 2009. <http://www.upenn.edu/gazette/0909/gaz07.html>
  - "YouTube's FastForward Biz Site Off to Slow Start," *ReadWriteWeb Blog*, September 23, 2009.



- [http://www.readwriteweb.com/archives/youtubes\\_fastforward\\_biz\\_site\\_off\\_to\\_slow\\_start.php](http://www.readwriteweb.com/archives/youtubes_fastforward_biz_site_off_to_slow_start.php)
- “Fast.Forward. Connecting marketers with innovative ideas (and other marketers),” YouTube Biz Blog, September 23, 2009. <http://ytbizblog.blogspot.com/2009/09/fastforward-connecting-marketers-with.html>
- “Will the Future of Advertising Be a Blend of Old and New Media?” Knowledge@Wharton, September 30, 2009. <http://knowledge.wharton.upenn.edu/article.cfm?articleid=2344>
- “What’s the future of advertising?” InternetNews.com, October 2, 2009. <http://blog.internetnews.com/dneedle/2009/10/whats-the-future-of-advertisin.html>
- “New Year, New Look for Google for Advertisers,” Google Agency Ad Solutions Blog, January 13, 2010. <http://adwordsagency.blogspot.com/2010/01/new-year-new-look-for-google-for.html>
- “Interview: Yoram (Jerry) Wind,” First Friday Book Synopsis, July 26, 2009. <http://ffbsccn.wordpress.com/2009/07/26/interview-yoram-jerry-wind/>. Also published on Examiner.com, July 26, 2009. <http://www.examiner.com/x-14678-Dallas-Business-Commentary-Examiner~y2009m7d26-Interview-Yoram-Jerry-Wind>
- “Tips for Better Networking Skills,” FOX Business News, July 17, 2009. <http://www.foxbusiness.com/search-results/m/25340846/tips-for-better-networking-skills.htm>
- Featured book in Wharton Alumni Newsletter: *The Network Challenge: Strategy, Profit, and Risk in an Interlinked World*, July 2009. <http://www.wharton.upenn.edu/alumni/newsletter/2009/july/>
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Wharton Alumni Magazine	December	2007	Featured article
Wharton Alumni Newsletter	August	2007	Featured book
Wharton Alumni Newsletter	December	2007	Featured book
Wharton Executive Education - - featured on home page	September	2007	Featured book
Wharton Faculty / Staff newsletter	September	2007	Featured book
Wharton Faculty / Staff newsletter	December	2007	Competing in a Flat World Competition Announcement
Knowledge at Wharton	October	2007	Interview with audio download
Competing in a Flat World website	October	2007	Website went live in October
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  - Wind, Yoram (Jerry). "Managing in the Year 2000" *Executive Issues*. August 1991.

## 7. PERSONAL DATA

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**Marital Status:** Married to Vardina Wind, Artist, (BA in Sociology, MA in Communications); Two children.

### Illustrative Pro Bono Activities

The Interdisciplinary Center, Herzliya (Israel), all planning activities and other involvement (as outlined on p. 43), since 1994.

American Friends of IDC – Founding President (1998-2002); Member (2003-present).

Government of Catalonia, International Advisory Board (2007-present)

Lauder Institute Alumni Association, Advisory Board (2005-present)

The Philadelphia Museum of Art. Trustee (1992-present); Member of the Digital Age Committee (2009-present); Member of the Corporate Executive board of the Museum (1996-present); Led a trustee committee and the management and curatorial staff of the museum in the development of a market driven strategy, (1990); Member of the Nominating Committee (1999-2002); Member of Trustee Committees for Development (1993-1997); Special Exhibitions (1993-1995); and Strategy (1997-1998); Chairman, Audience Building Committee (2004- );

Business for Diplomatic Actions, Member, Advisory Board and Coordinator of the Wharton research efforts in this area (2005-2010)

The Fox Chase Cancer Center, Member, Advisory Board (2009-2012)

Institute of Contemporary Art (ICA). Help guide a strategic planning process (2001).

The Jewish Federation of Greater Philadelphia: Member of the Financial Resource Development Committee, 1990-1992.

National Constitution Center, Member, Strategic Planning Steering Committee (2005)

Operation Independence, Israeli Management School Oversight Committee, 1991-1992.

The Philadelphia Orchestra: Advisor regarding the development of Marketing Strategy (1994-1997).

University of Pennsylvania Museum of Archeology and Anthropology. Help establish a vision and revenue generation strategies (1999).

### Affiliations:

The Philadelphia Museum of Art – Trustee (Philadelphia)  
The Barnes Foundation (Philadelphia)  
The Institute of Contemporary Art of the University of Pennsylvania (Philadelphia)  
Pennsylvania Academy of the Fine Arts (Philadelphia)  
The Museum of Modern Art (New York)  
Museum of Art and Design (New York)  
The New Museum (New York)  
Whitney Museum of American Art (New York)  
The Jewish Museum (New York)  
Guggenheim Museum (New York)  
U.S. Holocaust Memorial Museum (Washington D.C.)

*APPENDIX C*

*APPENDIX C*

## Trial and/or Deposition Testimony 2007-2014

### 2007

- GlaxoSmithKline Consumer Healthcare LP v. Merix Pharmaceutical Corp.  
[Winston & Strawn]  
*Deposition*
- Cunningham v. IBM, No. 421,453 (19th Judicial District Court, East Baton Rouge, Louisiana)  
[Covington & Burling LLP]  
*Deposition*
- Dyson Technology Limited v. Hoover, Inc. and Maytag Corp.  
[Winston & Strawn]  
*Deposition*
- In Re: Adjustment of Rates and Terms for Preexisting Subscription Services and Satellite Digital Audio Radio Services before the Copyright Royalty Board docket no. 2006-1 CRB DSTRA  
[Jenner & Block]  
*Deposition, Trial*
- Environmental World Watch, Inc. v. The Procter & Gamble Distributing Co., Los Angeles Superior Court No. BC 338895; Council for Education & Research on Toxics v. McDonald's Corp., et al., Los Angeles Superior Court No. BC 280980; and People of the State of California v. Frito-Lay, et al., Los Angeles Superior Court No. BC 337618  
[Goodwin Procter LLP]  
*Deposition*
- Auto Meter Products, Inc., v. Maxima Technologies & Systems, LLC (Northern District of Illinois Eastern Division, Civil Action No. 05cv4587  
[Pattishall, McAuliffe, Newbury, Hilliard & Geraldson]  
*Deposition*

### 2008

- Doctor's Associates v. QIP Holders LLC and Ifilm, Inc.  
[Winston & Strawn]

### 2009

- LG Electronics USA, Inc. v. Whirlpool Corp.  
[Winston & Strawn]  
*Deposition*
- The Gap, Inc. and Gap (Apparel) LLC v. G.A.P. Adventures, Inc. 07 CV. 9614 (AKH)  
[Locke Lord Bissell Liddell]  
*Deposition*
- The Scotts Company LLC v. Central Garden & Pet Company and Gulfstream Home & Garden, Inc.  
[Winston & Strawn]  
*Deposition*

- Dyson, Inc., v. Oreck Corporation; Oreck Holdings, LLC; Oreck Direct, LLC; Oreck Merchandising, LLC; Oreck Sales, LLC; Oreck Homecare, LLC; and Oreck@Home, LLC; Civil Action No. 07-9633 (Eastern District of Louisiana)  
[Winston & Strawn]  
*Deposition*
- THOIP (A Chorion Limited Company) v. The Walt Disney Company, Civil Action No.:08 cv 6823 (SAS)  
[Moses & Singer]  
*Deposition*
- Wal-Mart Stores, Inc., vs. GFA Brands, Inc., Report #5032, NAD/CARU Case Reports  
[Vinson & Elkins LLP]

**2010**

- Quia Corp. v. Mattell Inc. and Fisher-Price Inc. Con N. C 10-1902 JF (HRL) (Re IXL vs. iXL)  
[K&L Gates LLP]  
*Deposition*
- Sharp Computer v. Dell Inc. Case No. 2:08 CV-05088-PGS-ES  
[Bingham McCutchen LLP]  
*Deposition*
- LG Electronics USA Inc. v. Whirlpool Corporation Civil Action No. 08 C 242 Northern District of Illinois Eastern Division  
[Winston & Strawn]  
*Trial*
- The Gap, Inc. and Gap (Apparel) LLC v. G.A.P. Adventures, Inc. 07 CV. 9614 (AKH)  
[Fitzpatrick, Cella, Harper & Scinto]  
*Deposition, Trial*
- THOIP (A Chorion Limited Company) v. The Walt Disney Company, Civil Action No.:08 cv 6823 (SAS)  
[Moses & Singer]  
*Deposition, Trial*

**2011**

- Sara Lee Corporation v. Kraft Foods, Inc. and Kraft Foods Global, Inc., Case No. 1:09-cv-03039, USDC for the Northern District of Illinois, Eastern Division  
[K&L Gates LLP]  
*Deposition & Trial*
- Louis Vuitton Malletier, S.A. v. Hyundai Motor America, 10 Civ.1611 (PKC), Southern District of New York  
[Quinn Emanuel Urquart & Sullivan, LLP]  
*Deposition*
- Whirlpool Corp. vs Sensata Technologies and Texas Instruments, Inc., No. 09 L 1022 Circuit Court of Cook County, Illinois

[Greenburg Traurig]  
*Deposition*

## **2012**

- Santamarina , et. al. v. Sears Roebuck & Company, Case # BC326946, Superior Court of California, Los Angeles  
[Greenberg Traurig]  
*Deposition*
- Finjan, Inc. v. McAfee, Inc., Symantec Corp., Webroot Software, Inc., Websense, Inc., and Sophos, Inc., CA no. 10-593-GMS, US District Court for the District of Delaware  
[Kramer Levin]  
*Deposition*
- American Beverage Corporation and Pouch Pac Innovations, LLC v. **DiAgeo North America, Inc.**, and DiAgeo Americas Supply, Inc. t/d/b/a Captain Morgan Co., CA no. 12:12-cv-00601-JFC, US District Court for the Western District of Pennsylvania  
[Fitzpatrick, Cella, Harper & Scinto]  
*Trial*
- **Moldex-Metric, Inc.** v. McKeon Products, Inc., CA no. CV11-01742 GHK (AGRx), US District Court for the Central District of California Western Division  
[Quinn Emanuel Urquart & Sullivan, LLP]  
*Deposition*
- Dyson, Inc. v. **BISSELL Homecare, Inc.**  
[Pattishall, McAuliffe, Newbury, Hilliard & Geraldson, LLP]  
*Deposition*
- Apple, Inc. vs. **Samsung Electronics Co. Ltd.**  
[Quinn Emanuel Urquart & Sullivan, LLP]  
*Deposition*

## **2013**

- QS Wholesale, Inc. v. World Marketing, Inc., Case # 8:12-cv-00451-DOC-RNB, United States District Court for the Central District of California Southern Division  
[Covington & Burling]  
*Deposition, Trial*
- Rembrandt Social Media v. Facebook, Inc., et al. United States District Court – VAED (Alexandria) – C.A. No. 1:13 cv 158  
[Fish & Richardson]  
*Deposition*

**2014**

- American Petroleum Institute, et al., v. Roy A. Cooper, III, Attorney General of North Carolina, No.5:08-CV-396-FL, USDC, EDNC, WD.  
[Covington & Burling]  
*Trial*



***APPENDIX D***

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# **ESOMAR 28 Questions** *to help buyers of online samples*

# Introduction

The primary aim of these 28 Questions is to increase transparency and raise awareness of the key issues for researchers considering whether an online sampling approach is fit for their purpose. A related aim is to ensure that what they receive meets their expectations. Notes on the context explain why the questions should be asked, and which issues researchers should expect to be covered in the answer.

This revises ESOMAR's 26 Questions to Help Research Buyers of Online Panels, which were also designed to facilitate consistent terminology for providers to state how they maintain quality to enable buyers to compare the services of different suppliers.

ESOMAR has updated the text to recognize the ongoing development of techniques. Whilst some of the questions remain constant, new questions have been added to incorporate new techniques and new technology in this area.

These 28 Questions complement ESOMAR's Guideline to Online Research, which was revised in 2011 to add updated legal and ethical guidance and new sections on privacy notices, cookies, downloadable technology and interactive mobile.

## Company Profile

### 1. What experience does your company have in providing online samples for market research?

*Research Now* has been providing high quality, proprietary, research-only online panel sample since 2001. We are an independent single source for permission-based data collection across the Americas, Europe, the Middle East and Asia-Pacific.

We manage thousands of projects per month, for which we provide sample, survey programming, data processing and other field services as requested.

These are executed by our industry-leading programming and project management teams. We are experienced, research-literate, multi-lingual data collection specialists, servicing our clients across more than 25 offices worldwide.

# Sample Sources and Recruitment

2. Please describe and explain the type(s) of online sample sources from which you get respondents. Are these databases? Actively managed research panels? Direct marketing lists? Social networks? Web intercept (also known as river) samples?

All of our panels are actively managed online access panels which include both the *Valued Opinions*® Panels and *e-Rewards*® Opinion Panels. These panels are proprietary and built from over a decade of experience. All panels are localized – not just translated – with native language panel support and country-specific reward choices.

We run a multitude of recruitment campaigns, from email and online marketing channels with hundreds of diverse online affiliate partners and targeted websites to our various panels supporting both “open enrollment” and “*By-Invitation-Only*”® models.

“*By-Invitation-Only*” is a proprietary method of exclusively inviting pre-validated individuals, or individuals who share known characteristics, to enroll into our market research panels. We achieve “*By-Invitation-Only*” by partnering with a diverse set of globally recognized consumer and business-facing brands.

3. If you provide more than one type of sample source: How are the different sample sources blended together to ensure validity? How can this be replicated over time to provide reliability? How do you deal with the possibility of duplication of respondents across sources?

*Research Now* works to optimally blend our proprietary sample sources according to guidelines provided by independent research advisor Marketing Inc.

We ensure transparency with our clients should an external panel partner be required to complete quotas.

To exclude duplication, we assess the panel sources during project setup and apply Browser Fingerprinting technology. For all projects utilizing a combination of our sample sources, Browser Fingerprinting is centralized.

#### 4. Are your sample source(s) used solely for market research? If not, what other purposes are they used for?

Yes, absolutely. *Research Now's* panels are used for market research purposes only. This applies to all of our proprietary panels across the world without exception.

This is done to prevent bias responses, and therefore ensures the validity of sample delivered.

#### 5. How do you source groups that may be hard to reach on the internet?

We design recruitment campaigns to specifically target hard-to-reach population segments by selecting unique sources and applying tailored campaigns.

In order to guarantee our detailed knowledge of the specificities of our panelists, we employ hundreds of profiling attributes on our panels.

Due to the size of our panels, we can drill down to incidence rates 1-2%. To facilitate this process, we have deeply profiled our panels and deploy carefully designed pre-screeners to collect information for niche sample targets such as finance, IT decision makers and health ailments.

#### 6. If, on a particular project, you need to supplement your samples with samples from other providers, how do you select those partners? Is it your policy to notify a client in advance when using a third-party provider?

We ensure transparency with our clients should an external panel partner be required to complete quotas.

If to complete quotas a further source is required, we use external panel providers.

We only use trusted panel partners and operate on the basis of a preferred supplier list. We will always communicate to our clients in the event of using a non-proprietary panel.

Our dedicated team has thoroughly sourced and built an extensive global database of panel suppliers. Before employing third-party sample, external providers must comply with a pre-identified set of questions and provide credentials. For example, we would ask them whether they have specialty panels, which countries they can cover, their panel book, whether they have a set minimum incidence or a maximum LOI, etc.

## Sampling and Project Management

#### 7. What steps do you take to achieve a representative sample of the target population?

Sample selection is based on the sample needs and client requirements for each individual survey. Ideally, pre-profiled sample is used to minimize screen-outs and provide a better quality panelist experience. Customized sampling, e.g. nationally representative outgo, is also available.

*Research Now* balances samples for clients on outbound, inbound and completes quotas using a wide range of targeting criteria, from simple demographics to more complex behavioral and attitudinal profiling.

Once a sample has been selected, email invites are automatically randomized so as not to induce bias.

Samples can also be subject to category restrictions. This is a process whereby all projects are coded with subject identification code so that the respondents who have taken part in surveys on one of the pre-coded subjects over a stated time period, e.g. a survey on alcohol in the last three months, can be excluded. As a rule, we apply major category exclusions to surveys on a three-month basis. Criteria can be more restrictive on demand.

## 8. Do you employ a survey router?

Yes, in select countries with sufficient volumes of surveys and members to support proper randomization, and only with client approval. *Research Now* has two router platforms, both of which are “second chance” routing technology, solely used to direct respondents who have terminated from a survey they were invited to take into another survey. *Research Now* does not currently employ routers that initially assign respondents to surveys.

## 9. If you use a router: Please describe the allocation process within your router. How do you decide which surveys might be considered for a respondent? On what priority basis are respondents allocated to surveys?

We use our router to redirect members who didn't match the qualifying criteria for a survey they were taking to a survey that corresponds to their demographic information. To be eligible, the invited members cannot have exceeded panel participation limits.

## 10. If you use a router: What measures do you take to guard against, or mitigate, any bias arising from employing a router? How do you measure and report any bias?

*Research Now* only employs routers that reassign disqualified members to surveys, and does so randomly, without prioritization and weighting. Total usage is less than one-third of all globally completed surveys.

## 11. If you use a router: Who in your company sets the parameters of the router? Is it a dedicated team or individual project managers?

Our Panel Operations and Research Standards teams are primarily responsible for router practices, configuration and settings. Their leaders also head a global team of sampling and research experts who assist with thought leadership and research on research best practices and methodologies.

**12. What profiling data is held on respondents? How is it done? How does this differ across sample sources? How is it kept up-to-date? If no relevant profiling data is held, how are low incidence projects dealt with?**

We profile both of our proprietary samples (*Valued Opinions*<sup>®</sup> and *e-Rewards*<sup>®</sup>) with the same criteria. The collection and update of this profiling is ensured through various approaches.

Basic demographic information (e.g. age, gender, region, household demographic) is collected at registration. A verification email and short survey are immediately sent to collect further profiling. Panelists also have the option to enter profile information via their member page at any point.

Specific screeners or profiling surveys are run when *Research Now* is building a particular sub-panel (e.g. automotive, mobile phone habits, financial services) or for a particular project. If the data collected as part of this process is re-useable it becomes part of the member profile.

Profiling data is consistently updated. Panelists are prompted regularly to re-enter profiling criteria in order to ensure accuracy of segmentation and respondents.


**13. Please describe your survey invitation process. What is the proposition people are offered to take part in individual surveys? What information about the project itself is given in the process? Apart from direct invitations to specific surveys (or to a router), what other means of invitation to surveys are respondents exposed to? You should note that not all invitations to participate take the form of emails.**

At time of enrollment, new panelists are asked to join an online market research panel. At this point it is made clear that it is for research-only purposes and that this is not part of a sales process.

In each survey invite, panelists are informed about the survey topic in a topline, non-leading way before participation. Panelists are rewarded for taking part in surveys with a structured incentive scheme, reflecting the length of survey and nature of the sample. Panelists are supported by a dedicated team and have the option to unsubscribe at any time. Panel Management is compliant with market research industry standards, data protection and privacy laws.

For examples of our Terms and Conditions in individual markets, please refer to:

- <http://www.valuedopinions.com/eng/terms-and-conditions>
- <http://www.e-rewards.com/memberagreement.do>



**14. Please describe the (various) incentives that respondents are offered for taking part in your surveys. How does this differ by sample source, by interview length, by respondent characteristics?**

*Research Now* uses an incentive scale which is based on set time increments and the panelist profile. For example, a medical practitioner would generally be paid a significantly higher incentive per completed survey than the average consumer. The incentives to be awarded for these “specialist” opinions are discussed with the client so that they are attractive enough for time-poor/money-rich individuals to want to participate. All incentives are awarded only once the survey has been completed. The incentive options allow panelists to redeem from a large range of gift cards, points programs, and partner products or services.

**15. What information about a project do you need in order to give an accurate estimate of feasibility using your own resources?**

In order to accurately assess whether we will be able to help with a particular project, we require the following information:

- Target country
- Profile of the target audience
- Desired sample size
- Expected incidence on targeted sample and/or incidence on general population
- Time in field for completion
- Presence of sub-quotas
- Length of the interview (as this can affect response and abandon rates)

With this data available, we will be able to accurately measure to what extent we are able to deliver on a certain target or find solutions to help our clients get the data they need.

**16. Do you measure respondent satisfaction? Is this made available to clients?**

Yes, we conduct member satisfaction surveys and project feedback studies.

We regularly measure panelist satisfaction on elements such as frequency of invitations, value and diversity of incentives and redemption choices, their willingness to complete various lengths of surveys, and our level of responsiveness to any questions or concerns they share with our Member Services team.

Additionally, at the end of selected completed surveys, we gather feedback from participants on their experience. This data is available to clients on aggregate as a benchmark and for each of the surveys they run.

**17. What information do you provide to debrief your client after the project has finished?**

For projects where *Research Now* provides programming and hosting services, we capture all participation history, the date of entry, and panel recruitment source for each member. Provided it does not involve the disclosure of personally-identifiable information, we are able to provide this to clients as a report upon request.



For full-service projects where *Research Now* hosts the survey, it is also possible to see a full survey activity report for each project.

The key statistics from such a report detail:

- Fieldwork dates
- Total number of survey invitations sent
- Number of surveys started
- Number of screen-outs/quota-fulls and survey drop-outs
- Number of completes

Additionally, we collect our panelists' feedback about their survey experience in order to measure their satisfaction. We can provide this data on demand. It can be helpful to spot strong points and weaknesses in the research design itself.

## Data Quality and Validation

18. Who is responsible for data quality checks? If it is you, do you have in place procedures to reduce or eliminate undesired within-survey behaviors, such as (a) random responding, (b) illogical or inconsistent responding, (c) overuse of item non-response (e.g. "Don't Know"), or (d) speeding (too-rapid survey completion). Please describe these procedures.

Data quality is at the forefront of *Research Now's* role as a provider of digital data, so for surveys where *Research Now* provides the hosting and programming, we will run a series of quality checks on the data collected.

We monitor the quality of our data as follows:

**(a) Random responding** – Review of the data to ensure that answers are logical; we also have additional logic checks built into the script to ensure respondents cannot continue if they try to submit an illogical answer.

**(b) Illogical or inconsistent responding** – This is monitored and detected by use of logic checks that are programmed into the script. To ensure that these are fully activated, the project manager completes the survey and attempts to bypass the logic. The quality assurance team will also re-check the link to ensure that the programmed logic is operating correctly, prior to the survey going live.

**(c) Overuse of item non-response (e.g. 'Don't Know')** – *Research Now* refers to these respondents as flatliners, who are captured and removed from the final data during our quality checks.

**(d) Speeding (overly quick survey completion)** – Responses where the completion time is less than 30% of the median length of the survey are identified across the entire sample. The project manager checks the route that the respondent followed to ensure they have not bypassed a significant section of the survey, and completes a sense check of any verbatim. If any of these are found to be true, they are classified as speeders and are removed from the final data.

We work closely with our clients in order to reduce occurrences of survey offending, monitor offenders, and employ different techniques to address the behavior of respondents who regularly provide poor quality data.

A well-designed survey has been shown to often be the best way to reduce data quality issues. *Research Now* can help clients and provide feedback based on our rich experience and industry best practices.

**19. What limits, if any, do you place on solicitation for surveys?  
I.e. how often can any individual be contacted to take part in a survey  
whether they respond to the contact or not? How does this vary across  
your sample sources?**

Each panelist is assigned an individual ID, so that we can record their entire survey participation history. This means we can carefully select panel members for each survey to ensure that they are not only relevant, but also not being over-contacted.

We therefore have limits on how many survey invitations panelists are sent. These limits vary depending on country and sample source. For example, our B2C panelists may receive up to one invitation every eight hours, while our hard-to-reach respondents – such as C-Level panelists – will receive invites much less frequently in order to safeguard them from over-emailing. For an additional level of protection, we also impose cumulative weekly and monthly limits on participation.

Upon request, we can exclude re-invites to respondents who have participated in either a survey of the same topic or for the same client. The timeframe on these limits can be stipulated by the client.

**20. What limits, if any, do you place on survey participation?  
I.e. how often can any individual take part in a survey? How does this vary  
across your sample sources? How do you manage this within categories  
and/or time periods?**

In order to avoid “professional” panelists, we limit survey participation. This avoids excessive survey participation which would otherwise create survey fatigue and potential bias.

We place a limit on both the number of invites available to all our members and on the number of qualified completes. B2B respondents have additional levels of protection to keep them from being over-used.

**21. Do you maintain individual level data, such as recent participation history,  
date of entry, source, etc., on your survey respondents? Are you able to  
supply your client with a per job analysis of such individual level data?**

We hold the complete survey participation history of every respondent on our panel.

Each panelist is assigned an individual ID number which stays with them throughout their entire panel membership and allows us to track their history, date of entry, source, etc.

We can also provide a per-job analysis to clients.

22. Do you have a confirmation of respondent identity procedure? Do you have procedures to detect fraudulent respondents? Please describe these procedures as they are implemented at sample source registration or at the point of entry to a survey or router. If you offer B2B samples what are the procedures there, if any?

We have a series of defined processes in place to ensure the high quality of our respondents. It includes checking for duplicate respondents by evaluating variables such as email address, matches across several demographic data, and device-related data through our use of Imperium's RelevantID.

Over the course of the membership, our quality management systems help us confirm identities on all of our panels. Additionally, the nature of our "By-Invitation Only"® panelist recruitment allows us to be fully confident of their demographic details. *Research Now* offers TrueSample in the U.S., UK, Canada and Germany. With TrueSample, panelist identity is validated using third-party databases.

A second series of processes helps us identify invalid responses and consequently eliminate the offenders.

## Policies and Compliance

23. Please describe the 'opt-in for market research' processes for all your online sample sources.

All of our panelists are required to double opt-in.

New panelists who enroll complete our website panel registration form. An email is then deployed to further confirm that they consent to opt-in to the panel.

New panelists who re-confirm their opt-in become a part of the active panel and are eligible to be invited to participate in surveys. Panelists who do not re-confirm their opt-in will not be activated or contacted to participate in a survey.

24. Please provide a link to your Privacy Policy. How is your Privacy Policy provided to your respondents?

We follow all national, regional and local laws with respect to privacy and data protection. As such, the privacy policy for each panel adheres to local law.

We ensure our panels comply with all applicable industry standards set by ESOMAR, MRS (UK), AMSRS (Australia), BVM (Germany), CASRO (U.S.), MRA (U.S.), MRIA (Canada), etc.

Amongst others, this includes observing the following guidelines:

- Voluntary co-operation of panelists
- Protection of researchers' and respondents' identities
- Terms & Conditions and privacy policies compliant with local laws
- State-of-the-art data security policies and measures
- Reliable and validated data procedures
- Strict adherence to rules governing the interviewing of children and young people

In our main markets, panel privacy policies are audited and approved by TRUSTe, the online privacy trust mark.

For examples of our privacy policies in individual markets, please refer to:

- <http://www.valuedopinions.com/eng/privacy-policy>
- <http://www.e-rewards.com/privacypolicy.do>

## 25. Please describe the measures you take to ensure data protection and data security.

### **Data Protection**

*Research Now* follows all local data protection regulations. Our training teams conduct extensive trainings on Data Protection with client-facing staff highlighting industry (MRS, CASRO, etc.) and legal recommendations. Our in-house legal team is available for advice in any situation. As representative of our dedication to topics of data privacy, our largest country panels are all approved by TRUSTe, the industry's most recognized and respected privacy seal. Our Australian branch is ISO 20252 accredited, further proof of our commitment to quality.

### **Data Security**

We have secure servers to carry out the collection of survey data. Sampling is undertaken with highly encrypted links to the database servers. Personal information is fully protected and can only be communicated following a strict procedure. We also use randomization procedures to ensure there is no preferential treatment of certain parts of the database. Our sampling teams do not have direct access to the database to reveal the identity of users.

Survey data remains anonymous and is linked to the panel database using numeric IDs so the identity of the end-user (panelist) is always protected.

## 26. What practices do you follow to decide whether online research should be used to present commercially sensitive client data or materials to survey respondents?

Upon the commission of fieldwork, we will make sure the client is comfortable with any commercially-sensitive material being presented or discussed in the course of the project.

During sign-up, our panelists agree that they will treat the information they come across in confidence.

There are two levels of security features for scripting. Standard security is available by default on all projects, while premium security is only enabled on request and may incur an additional charge to the client.

For example, among the solutions developed by our scripting teams, we have tools to disable screenshots and copy-pasting, and we use streaming video to circumvent video buffering and web browser storage of files. We can also watermark an image with the respondent's ID number.

## 27. Are you certified to any specific quality system? If so, which one(s)?

*Research Now* has established a defined project management process for each of the thousands of projects managed each month globally. This is supported by a carefully-documented procedure form which is managed and maintained by our project managers from project kickoff to delivery. In APAC, our Australian office complies with ISO 20252 management system standards.

## 28. Do you conduct online surveys with children and young people? If so, do you adhere to the standards that ESOMAR provides? What other rules or standards, for example COPPA in the United States, do you comply with?

We occasionally conduct online surveys with children and young adults.

In these instances, we adhere to ESOMAR standards and all applicable local regulatory and legal requirements, including COPPA in the U.S.

When we target respondents below the legal age to participate, they are recruited via their parent/guardian and interviewed only with parental permission.

Parents are provided with full details about each survey and its objectives. They can also view the full survey prior to their child, should they wish.

### **Project Team**

Adam Phillips, Chair of ESOMAR Legal and Professional Standards Committees  
Pete Cape, Global Knowledge Director, SSI and Editor of the text  
Reg Baker, COO, Market Strategies International  
Mike Cooke, Director, Global Panel Management, GfK  
Efrain Ribeiro, COO, Lightspeed Research  
George Terhanian, Chief Strategy and Product Officer, Toluna U.S.A.

### **Guidance of Professional Standards**

Maintaining consumer trust is integral to effective market, social and opinion research. ESOMAR, through its codes and guidelines, promotes the highest ethical and professional standards for researchers around the world.

The ICC/ESOMAR Code on Market and Social Research, which was developed jointly with the International Chamber of Commerce, sets out global fundamentals for self-regulation for researchers.

It has been undersigned by all ESOMAR members and adopted or endorsed by more than 60 national market research associations worldwide.

The ESOMAR Guideline on Online Research is of particular relevance to researchers using online panels, and should be read in conjunction with these questions for more explanation of the legal and professional responsibilities of researchers who are collecting and analyzing online research data.

In addition, ESOMAR has issued the following guidelines to provide more detailed advice on how to address the legal, ethical and practical considerations of conducting specific areas of research.

- Guideline on Social Media Research
- Guideline on Research via mobile phone
- Guideline on Online research including interactive mobile
- Guideline on Distinguishing market research from other data collection activities
- Guideline on Passive data collection, observation and recording
- Guideline on Interviewing children and young people
- Guideline on Customer satisfaction studies
- Guideline on Mystery shopping
- Guideline on How to commission research
- ESOMAR/WAPOR Guide to opinion polls



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Research Now or for a custom quote,  
contact us at [info@researchnow.com](mailto:info@researchnow.com).*

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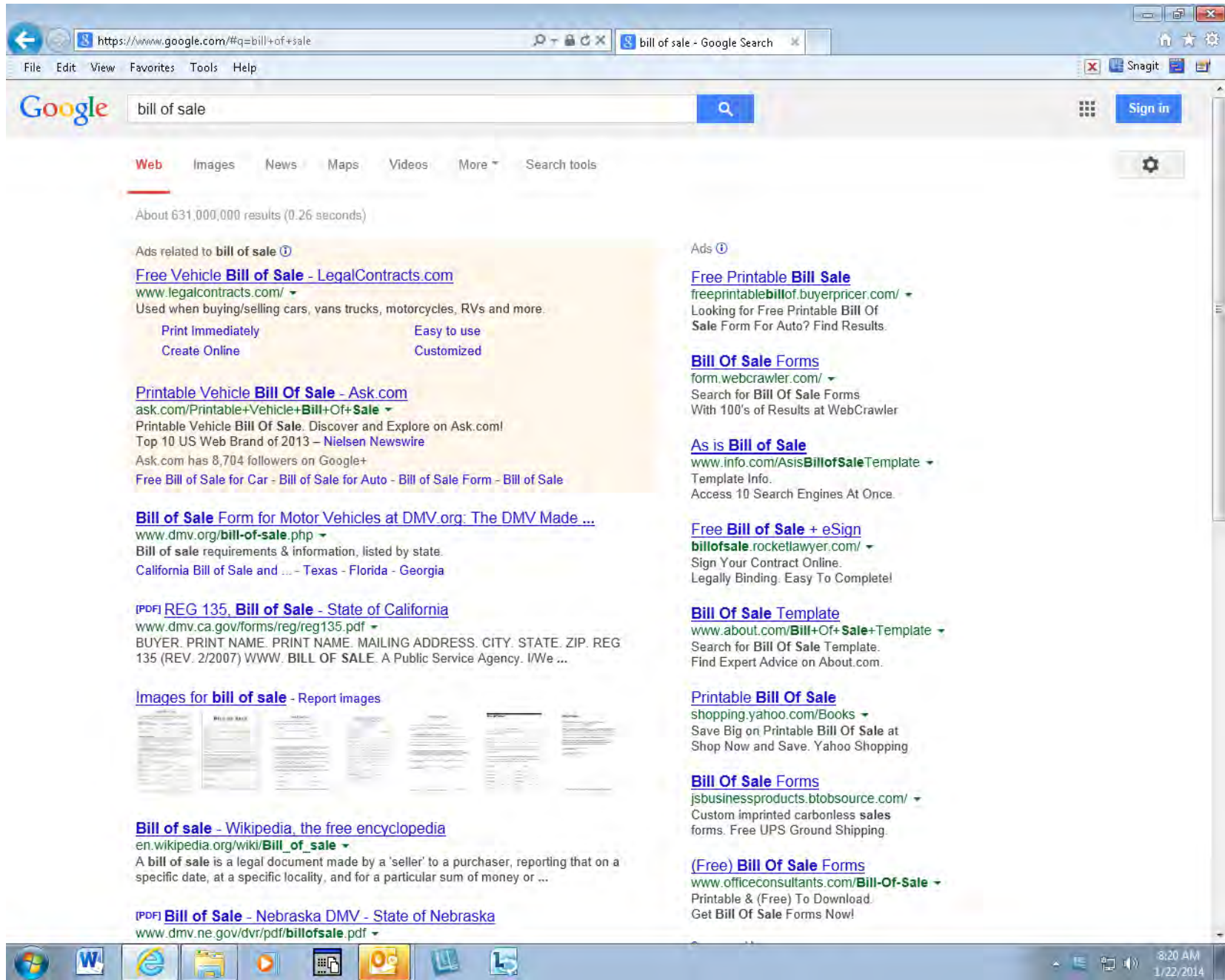
***APPENDIX E***

***APPENDIX E***


TEST



IMAGE 1 - TEST






8:20:27 AM 1/22/2014

**ROCKETLAWYER** (877) 881-0947 or [HELP](#)  [Sign up](#) | [Sign in](#)

## Make Your Free Bill of Sale

**How it works:**

 Build your document →  Save, Print & Share →  Sign it & make it legal!

**Start by selecting a state.**

California


**Bill of Sale**

This Bill of Sale is a legal document that transfers ownership of personal property from a seller to a buyer. **Please note:** this Bill of Sale cannot be used to transfer real estate or intellectual property. This specific Bill of Sale is only used to transfer personal property, like furniture and equipment. If you would like to transfer other personal property, like a car, boat, or motorcycle, use a **Vehicle Bill of Sale**, **Boat Bill of Sale**, or a **Motorcycle Bill of Sale** form as these documents will

**Bill of Sale: Draft**  ◀ Page 1 of 2 ▶

State of \$0.00

IMAGE 3 - TEST

**ROCKETLAWYER** (877) 881-0947 or [HELP](#)  [Sign up](#) | [Sign in](#)

### Bill of Sale: Interview

PROGRESS 0%


#### Where is the property being sold located?


*Enter the county and state where the property is being sold at the time of the sale.*

County:

State:

[Continue](#) [Save for later](#)

We're here to help.  
Chat with us » 


Help with this question 

**Bill of Sale: Draft** [Update preview](#) Page 1 of 2

State of  \$0.00

javascript:\_\_\_doPostBack('ctl00\$ctl00\$SiteMasterBody\$RedDesignBody\$Interview\$btnNext','')

IMAGE 4 - TEST

**ROCKETLAWYER** (877) 881-0947 or [HELP](#)  [Sign up](#) | [Sign in](#)

### Bill of Sale: Interview

**PROGRESS 8%**

#### Who is the Seller?

*Please enter the name and address of the person selling the property.*

Name:

Address:

City:

State:

ZIP Code:

Check here if there will be an additional Seller.

[Back](#) [Continue](#) [Save for later](#)

We're here to help.  
[Chat with us »](#)



Help with this question 

IMAGE 5 - TEST

**ROCKETLAWYER** (877) 881-0947 or [HELP](#)  [Sign up](#) | [Sign in](#)

### Bill of Sale: Interview

PROGRESS 25%

#### Who is the Buyer?

*Enter the name and address of the Buyer.*

Name:

Address:

City:

State:

ZIP Code:

Check here if there will be an additional Buyer.

[Back](#) [Continue](#) [Save for later](#)

We're here to help.  
[Chat with us »](#)



Help with this question 

IMAGE 6 - TEST

**ROCKETLAWYER** (877) 881-0947 or [HELP](#)  [Sign up](#) | [Sign in](#)

**Bill of Sale: Interview**

PROGRESS 41%

**Are you including a description of the property in this document or in an attachment?**

*Select whether the property will be described within this document or on a separate page that will be attached.*

Description in this document.

Description in an attachment or exhibit.

[Back](#) [Continue](#) [Save for later](#)

We're here to help.  
Chat with us »

Help with this question

**Bill of Sale: Draft** [Update preview](#) [Page 1 of 2](#)

State of \_\_\_\_\_ \$0.00


IMAGE 7 - TEST

The screenshot displays the RocketLawyer website interface. At the top, a red navigation bar contains the RocketLawyer logo on the left, and contact information on the right: "(877) 881-0947 or HELP" with a speech bubble icon and a US flag, and "Sign up | Sign in" with a user icon. The main content area is divided into two sections. The left section, titled "Bill of Sale: Interview", features a progress bar at 50% and a heading "Please describe the property being sold." Below this is a sub-heading and a note: "Be as specific as possible in your description. A detailed description makes it easier to identify the property. Note: be sure to include a serial or identification number, if one exists on the property being sold." A text input field labeled "Description:" contains the word "Furniture". At the bottom of this section are three buttons: "Back", "Continue", and "Save for later". The right section is a help chat window titled "We're here to help. Chat with us »" with a user profile picture. Below the title is a "Help with this question" section with a question mark icon.

Bill of Sale: Draft [Update preview](#)

Page 1 of 2

IMAGE 8 - TEST

**ROCKETLAWYER** (877) 881-0947 or [HELP](#)  [Sign up](#) | [Sign in](#)


**Bill of Sale: Interview**


PROGRESS 58%

**What is the total price Jane Doe is paying for the property?**  
*The total price is the monetary value that the Seller and Buyer have agreed upon.*

Price:

[Back](#) [Continue](#) [Save for later](#)

We're here to help.  
Chat with us » 

Help with this question 

**Bill of Sale: Draft** [Update preview](#) [Page 1 of 2](#)

State of \_\_\_\_\_ \$0.00  
County of \_\_\_\_\_ \_\_\_\_\_



**Bill of Sale: Interview**

PROGRESS 66%

**Select the form of payment used by Jane Doe?**

*Other forms of payment are acceptable. If none of these options apply, please select "Other" and enter the form of payment in the field below.*

- Cash
- Personal Check
- Certified Check
- Money Order
- Promissory Note
- Other

Other:

[Back](#) [Continue](#) [Save for later](#)

We're here to help.  
[Chat with us »](#)



Help with this question



IMAGE 10 - TEST

The image shows a screenshot of the RocketLawyer website. At the top, there is a red navigation bar with the RocketLawyer logo on the left, the phone number (877) 881-0947 or a HELP button with an American flag icon in the center, and Sign up | Sign in on the right. Below the navigation bar, the main content area is divided into two columns. The left column is titled 'Bill of Sale: Interview' and features a progress bar labeled 'PROGRESS 75%'. Below the progress bar is a question: 'How will sales tax be applied to the price for the property?'. A sub-note reads: 'The amount of sales tax varies from state to state, and also depends on the type of property being sold. Make sure to check your local laws to determine the amount of sales tax that will apply to your transaction.' There are two radio button options: 'Tax is included in the price' (which is selected) and 'Tax is in addition to the price'. At the bottom of this section are three buttons: 'Back', 'Continue', and 'Save for later'. The right column is a chat window titled 'We're here to help. Chat with us »' with a profile picture of a woman. Below this is a question mark icon and the text 'Help with this question'. Below the chat window, there is a preview section titled 'Bill of Sale: Draft' with an 'Update preview' button. The preview shows a form with the text 'State of \_\_\_\_\_' and '\$0.00'. At the top right of the preview area, it says 'Page 1 of 2'.

IMAGE 11 - TEST

**Bill of Sale: Interview**

PROGRESS 91%

**When will the property be transferred from the Seller to the Buyer?**

*Enter the date when both parties signed this Bill of Sale and legal ownership of the property is transferred. This is the effective date of the Bill of Sale. If you're unsure of the date, you can leave it blank and fill it in later.*

Date:  

We're here to help.  
[Chat with us »](#)



[Help with this question](#)



**Bill of Sale: Draft**

Page 1 of 2



State of California  
County of Alameda

\$100.00

# Save and continue on to your document!

[Return to interview](#)

**Sign up** | **Sign in**

 Sign up with Facebook |  Sign up with Google

**Email\***

**Password\***

Create a password that's at least 6 characters long with symbols or numbers.

**Do you own or operate a business?**  Yes  No

**Submit**

By continuing, I confirm that I have read and understand the [Terms and Conditions](#), [Privacy Policy](#), [On Call Terms of Service](#), and [Email Policy](#)

**Need help?**  
Call Us! (877) 881-0947



"Rocket Lawyer provides citizens with the right documentation to tackle some of the most common legal problems."




**VentureBeat**


**ROCKETLAWYER** (877) 881-0947 or [Get Help](#)  
 Hello, apw23rfgwa3eq23 | [Logout](#) | [Help](#)


## Payment Options

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To access your document choose one of our plans:

<p><b>Free Trial</b> One Week</p> <ul style="list-style-type: none"> <li>Get your document free with a one-week trial membership.*</li> </ul>	<p><b>FREE</b> For one week</p>
<p><b>Monthly Legal Plan</b></p> <ul style="list-style-type: none"> <li>Get documents reviewed for free after 90 days.</li> <li>Create as many new legal documents as you want.</li> </ul>	<p><b>\$17.95</b> Per Month</p>
<p><b>Best Deal</b> <b>Annual Legal Plan</b></p> <ul style="list-style-type: none"> <li>Get instant access to free document reviews from local attorneys.</li> <li>Create as many legal documents as you can.</li> </ul>	<p><b>\$9.99*</b> Per Month <small>*prepaid for 1 year</small></p>

[Continue](#)



*"Rocket Lawyer made it really easy to take my company to the next level."*  
Ryan Nurmela, CEO QuantumCamp

### What do I get with the Rocket Lawyer Plan?

- ✓ **In-Person legal help** from local, experienced attorneys at no additional cost
- ✓ **Free e-signature service** to execute legal contracts quickly and paperlessly
- ✓ **Unlimited access** to create and edit thousands of trusted legal documents
- ✓ **Safe and Secure online storage** for your legal documents in one convenient location

My Document

Draft

Page 1 of 8

\* After the 7-day trial period, benefits of the Monthly Legal Plan will continue automatically for \$19.95 per month.

**No thanks, I'll take the read-only version of my document.**

WALL STREET JOURNAL

The New York Times

BusinessWeek

Bloomberg

FOX NEWS

Forbes



# Free Trial Membership

Enjoy the benefits of a Rocket Lawyer Basic Legal Plan for one week

Type:

- Pro Legal Plan [Learn More](#)
- Basic Legal Plan [Learn More](#)

## Enter Your Account Information

Required fields are indicated by \*

Already have an account?

Username (Email Address)

Confirm Username

Password

Confirm Password

## Billing Information

Your credit card will not be charged for a legal plan during the trial period. As standard practice, our payment management system sends a one-cent charge to verify that a credit card is valid

Credit Card Type

Credit Card Number

Credit Card Security Code

Credit Card Expiration Date

Account Holder First Name

Account Holder Last Name

Company Name

Street Address

City

State

Postal Code

Yes, send me Rocket Lawyer partner offers, which are sent no more than twice per month and are from Rocket Lawyer's trusted business partners.

**You will not be billed today**  
 Your free trial entitles you to the Basic Legal plan for one-week. After your free trial ends, a Rocket Lawyer Monthly plan with unlimited free documents, e-signatures, sharing and other premium features will start and this credit card will be charged \$19.95/month.

**Why do I need to enter my credit card?**  
 Providing your credit card ensures that your service will continue uninterrupted at the end of your free trial.

**How do I cancel?**  
 If you decide that you don't want to keep your membership, simply downgrade the service to a free membership to discontinue the Legal Plan and \$19.95/month billing. The legal documents created and saved during your trial are free, which means they are yours to keep, and you can access them at any time.

**Your information is secure**  
 We use maximum encryption so that your personal information is safe and secure.

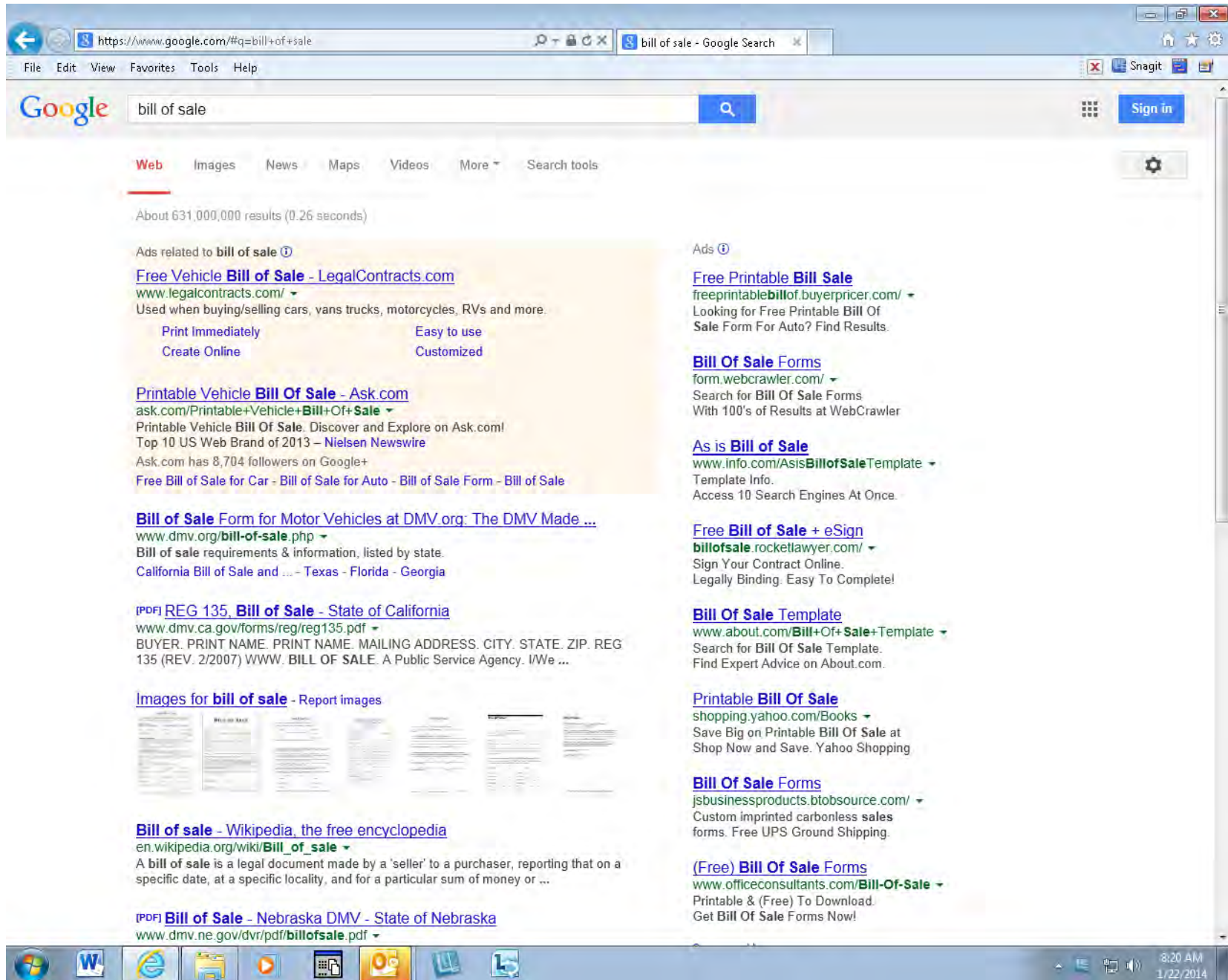
By clicking **Get free trial**, you are indicating that you have read, understood, and agree to the Terms of Service.

(877) 881-0947  
Call us Monday-Friday 6am-6pm PT

Email us

**Control**

IMAGE 1 - CONTROL



8:20:27 AM 1/22/2014





IMAGE 2 - CONTROL

**ROCKETLAWYER** (877) 881-0947 or [HELP](#)  [Sign up](#) | [Sign in](#)

## Make Your Free Bill of Sale

**How it works:**

 Build your document →  Save, Print & Share →  Sign it & make it legal!

**Start by selecting a state.**

California


**Bill of Sale**

This Bill of Sale is a legal document that transfers ownership of personal property from a seller to a buyer. **Please note:** this Bill of Sale cannot be used to transfer real estate or intellectual property. This specific Bill of Sale is only used to transfer personal property, like furniture and equipment. If you would like to transfer other personal property, like a car, boat, or motorcycle, use a **Vehicle Bill of Sale**, **Boat Bill of Sale**, or a **Motorcycle Bill of Sale** form as these documents will

**Bill of Sale: Draft**  ◀ Page 1 of 2 ▶

State of \$0.00

IMAGE 3 - CONTROL

**ROCKETLAWYER** (877) 881-0947 or [HELP](#)  [Sign up](#) | [Sign in](#)

### Bill of Sale: Interview

PROGRESS 0%


#### Where is the property being sold located?


*Enter the county and state where the property is being sold at the time of the sale.*

County:

State:

[Continue](#) [Save for later](#)

We're here to help.  
Chat with us » 

Help with this question 

**Bill of Sale: Draft** [Update preview](#) Page 1 of 2

State of  \$0.00

javascript:\_\_\_doPostBack('ctl00\$ctl00\$SiteMasterBody\$RedDesignBody\$Interview\$btnNext','')

IMAGE 4 - CONTROL

The screenshot displays the RocketLawyer website interface. At the top, a dark red header contains the RocketLawyer logo on the left, and contact information on the right: "(877) 881-0947 or HELP" with a speech bubble icon, an American flag icon, and "Sign up | Sign in" links.

The main content area is titled "Bill of Sale: Interview". Below the title is a progress bar labeled "PROGRESS 8%". The primary section is "Who is the Seller?", with a sub-instruction: "Please enter the name and address of the person selling the property." The form includes the following fields:

- Name: John
- Address: Doe
- City: Newark
- State: California (dropdown menu)
- ZIP Code: 94560

Below the form is a checkbox labeled "Check here if there will be an additional Seller." At the bottom of the form are three buttons: "Back", "Continue" (highlighted in orange), and "Save for later".

On the right side of the page, there is a chat window. It features a profile picture of a woman, the text "We're here to help. Chat with us »", and a "Help with this question" link next to a question mark icon.

IMAGE 5 - CONTROL

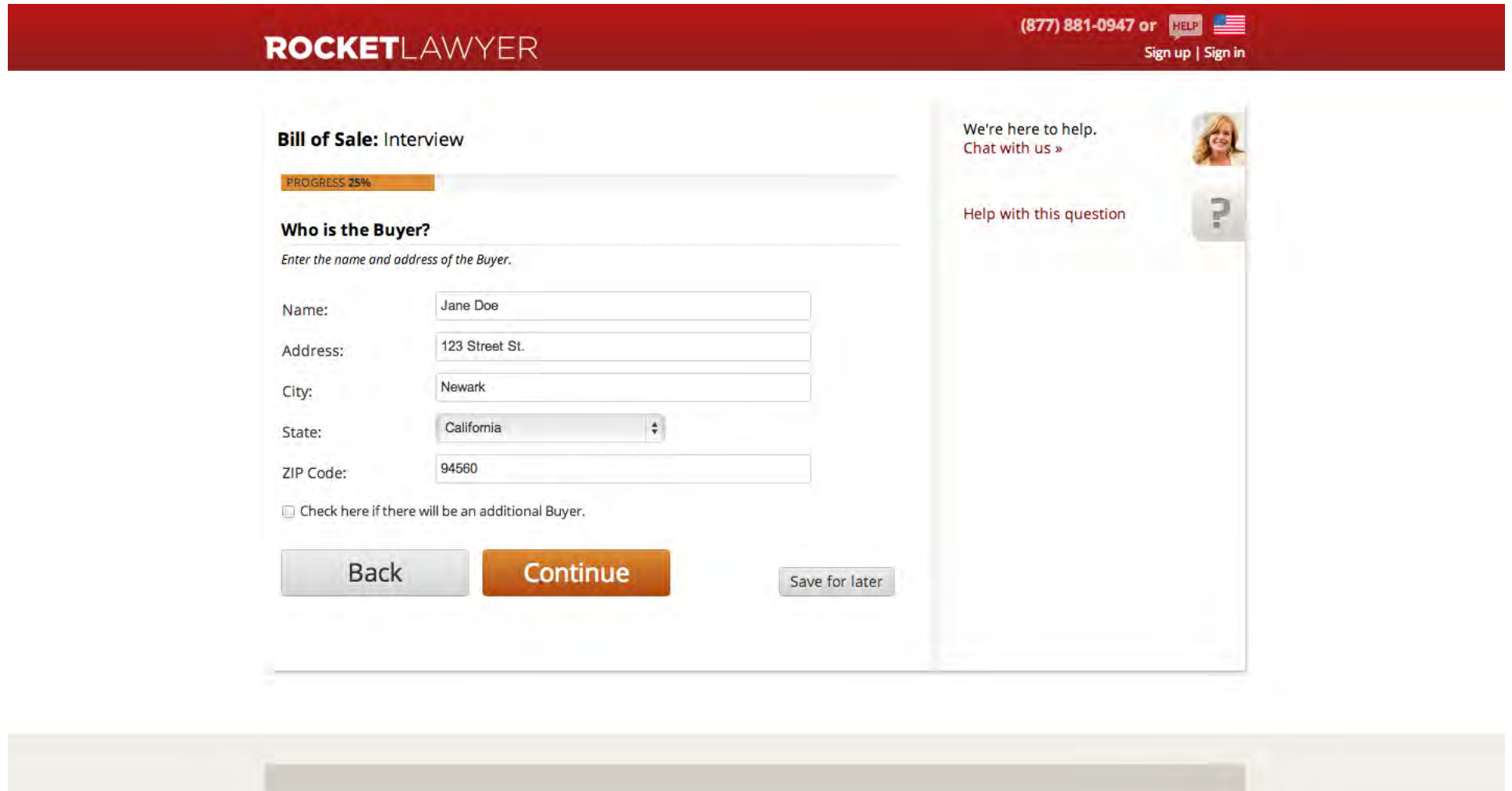


IMAGE 6 - CONTROL

The image shows a screenshot of the RocketLawyer website. At the top, there is a red navigation bar with the RocketLawyer logo on the left, and contact information on the right: "(877) 881-0947 or HELP" with a speech bubble icon, an American flag icon, and "Sign up | Sign in" links.

The main content area is divided into two columns. The left column is titled "Bill of Sale: Interview" and features a progress bar showing "PROGRESS 41%". Below the progress bar is a question: "Are you including a description of the property in this document or in an attachment?" with a subtext: "Select whether the property will be described within this document or on a separate page that will be attached." There are two radio button options: "Description in this document." (which is selected) and "Description in an attachment or exhibit." At the bottom of this section are three buttons: "Back", "Continue", and "Save for later".

The right column is a help chat area. It starts with the text "We're here to help. Chat with us »" next to a small profile picture of a woman. Below this is a "Help with this question" section with a question mark icon.

At the bottom of the page, there is a preview of a "Bill of Sale: Draft" document. The preview includes a header with "Bill of Sale: Draft" and an "Update preview" button, and a page indicator "Page 1 of 2". The main body of the preview shows the text "State of \_\_\_\_\_" followed by "\$0.00".

IMAGE 7 - CONTROL

The screenshot displays the RocketLawyer website interface. At the top, a red navigation bar contains the RocketLawyer logo on the left, and contact information on the right: "(877) 881-0947 or HELP" with a speech bubble icon and a US flag, and "Sign up | Sign in" with a user profile icon.


The main content area is titled "Bill of Sale: Interview". Below the title is a progress bar labeled "PROGRESS 50%". The primary instruction is "Please describe the property being sold.", followed by a note: "Be as specific as possible in your description. A detailed description makes it easier to identify the property. Note: be sure to include a serial or identification number, if one exists on the property being sold." A text input field labeled "Description:" contains the word "Furniture".

At the bottom of the form are three buttons: "Back", "Continue" (highlighted in orange), and "Save for later".

On the right side, a help chat window is open. It features a profile picture of a woman and the text "We're here to help. Chat with us »". Below this is a "Help with this question" section with a question mark icon.

A secondary screenshot at the bottom shows a "Bill of Sale: Draft" status with an "Update preview" button and a "Page 1 of 2" navigation indicator.

IMAGE 8 - CONTROL

**ROCKETLAWYER** (877) 881-0947 or [HELP](#)  [Sign up](#) | [Sign in](#)


**Bill of Sale: Interview**


PROGRESS 58%

**What is the total price Jane Doe is paying for the property?**  
*The total price is the monetary value that the Seller and Buyer have agreed upon.*

Price:

[Back](#) [Continue](#) [Save for later](#)


We're here to help.  
Chat with us » 

Help with this question 

**Bill of Sale: Draft** [Update preview](#) [← Page 1 of 2 →](#)

State of \_\_\_\_\_ \$0.00  
County of \_\_\_\_\_ \_\_\_\_\_

IMAGE 9 - CONTROL

**ROCKETLAWYER** (877) 881-0947 or [HELP](#)  [Sign up](#) | [Sign in](#)

### Bill of Sale: Interview

PROGRESS 66%

#### Select the form of payment used by Jane Doe?

*Other forms of payment are acceptable. If none of these options apply, please select "Other" and enter the form of payment in the field below.*

- Cash
- Personal Check
- Certified Check
- Money Order
- Promissory Note
- Other

Other:

[Back](#) [Continue](#) [Save for later](#)

We're here to help.  
[Chat with us »](#)


Help with this question 



IMAGE 10 - CONTROL

The image shows a screenshot of the RocketLawyer website. At the top, there is a red navigation bar with the RocketLawyer logo on the left, and contact information on the right: "(877) 881-0947 or HELP" with a speech bubble icon and an American flag, and "Sign up | Sign in" with a vertical line separator.

The main content area is divided into two columns. The left column is titled "Bill of Sale: Interview" and features a progress bar labeled "PROGRESS 75%". Below the progress bar is a question: "How will sales tax be applied to the price for the property?". A sub-note reads: "The amount of sales tax varies from state to state, and also depends on the type of property being sold. Make sure to check your local laws to determine the amount of sales tax that will apply to your transaction." There are two radio button options: "Tax is included in the price" (which is selected) and "Tax is in addition to the price". At the bottom of this section are three buttons: "Back", "Continue" (highlighted in orange), and "Save for later".

The right column is a help chat window. It says "We're here to help. Chat with us »" next to a profile picture of a woman. Below that, it says "Help with this question" next to a question mark icon.

At the bottom of the page, there is a preview of a "Bill of Sale: Draft" document. The preview shows the text "State of \_\_\_\_\_" followed by "\$0.00". Above the preview, there are buttons for "Update preview" and "Page 1 of 2".

IMAGE 11 - CONTROL

**Bill of Sale: Interview**

PROGRESS 91%

**When will the property be transferred from the Seller to the Buyer?**

*Enter the date when both parties signed this Bill of Sale and legal ownership of the property is transferred. This is the effective date of the Bill of Sale. If you're unsure of the date, you can leave it blank and fill it in later.*

Date:  

[Back](#) [Continue](#) [Save for later](#)

We're here to help.  
[Chat with us »](#)



[Help with this question](#)



**Bill of Sale: Draft** [Update preview](#)

Page 1 of 2

State of California  
County of Alameda


\$100.00

# Save and continue on to your document!

[Return to interview](#)

## Sign up

## Sign in

 Sign up with Facebook

 Sign up with Google

Email\*

Password\*

Create a password that's at least 6 characters long with symbols or numbers.

Do you own or operate a business?  Yes  No

By continuing, I confirm that I have read and understand the [Terms and Conditions](#), [Privacy Policy](#), [On Call Terms of Service](#), and [Email Policy](#)

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"Rocket Lawyer provides citizens with the right documentation to tackle some of the most common legal problems."



**VentureBeat**


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Legal Plan

- Get documents reviewed for free after 90 days.
- Create as many new legal documents as you want.

\$17.95

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- Get instant access to free document reviews from local attorneys.
- Create as many legal documents as you can.

\$9.99\*

Per Month  
\*prepaid for 1 year

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Ryan Nurmela, CEO QuantumCamp

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- ✓ **Free e-signature service** to execute legal contracts quickly and paperlessly
- ✓ **Unlimited access** to create and edit thousands of trusted legal documents
- ✓ **Safe and Secure online storage** for your legal documents in one convenient location

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Page 1 of 3

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BusinessWeek
Bloomberg
FOX NEWS
Forbes

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Required fields are indicated by \*

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Username (Email Address)

Confirm Username

Password

Confirm Password

## Billing Information

Your credit card will not be charged for a legal plan during the trial period. As standard practice, our payment management system sends a one-cent charge to verify that a credit card is valid

Credit Card Type

Credit Card Number

Credit Card Security Code

Credit Card Expiration Date

Account Holder First Name

Account Holder Last Name

Company Name

Street Address

City

State

Postal Code

Yes, send me Rocket Lawyer partner offers, which are sent no more than twice per month and are from Rocket Lawyer's trusted business partners.

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## You will not be billed today

Your free trial entitles you to the Basic Legal plan for one-week. After your free trial ends, a Rocket Lawyer Monthly plan with unlimited free documents, e-signatures, sharing and other premium features will start and this credit card will be charged \$19.95/month.

## Why do I need to enter my credit card?

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## How do I cancel?

If you decide that you don't want to keep your membership, simply downgrade the service to a free membership to discontinue the Legal Plan and \$19.95/month billing. The legal documents created and saved during your trial are free, which means they are yours to keep, and you can access them at any time.

## Your information is secure

We use maximum encryption so that your personal information is safe and secure.

By clicking **Get free trial**, you are indicating that you have read, understood, and agree to the Terms of Service.

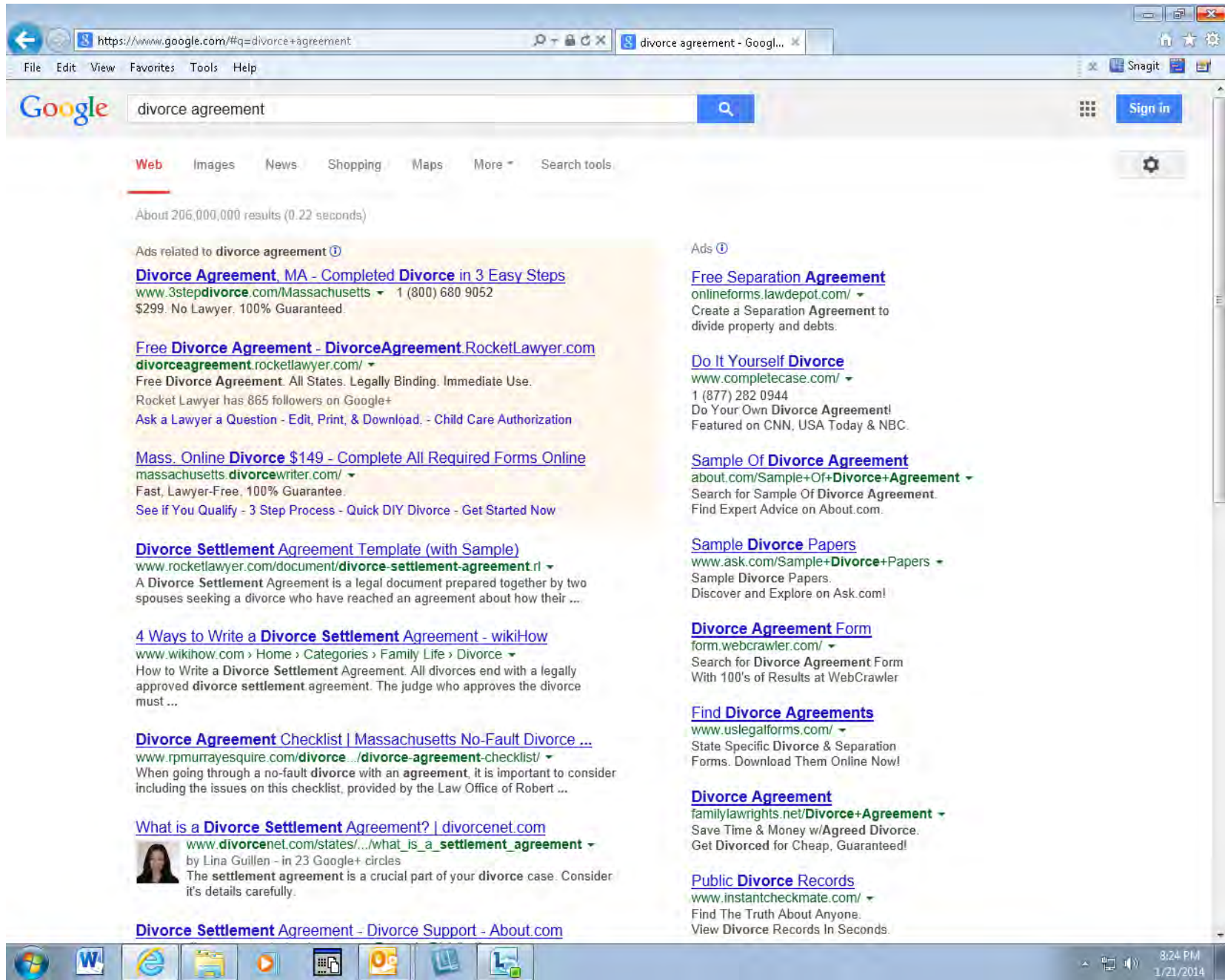
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Call us Monday-Friday 6am-6pm PT

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TEST

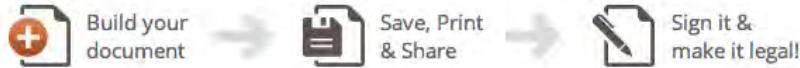
IMAGE 1 - TEST



8:24:11 PM 1/21/2014

# Make Your Free Divorce Settlement Agreement

## How it works:



Start by selecting a state.

California

**Make Document**

### Residency and Divorce

Residency refers to the length of time one or both of the parties have resided in a particular jurisdiction prior to filing for divorce. Each state has different residency requirements. In general, a state may require that one or both parties have resided in their state for at least 6 months before the state will consider granting a divorce. The residency requirement can be much longer. To find out the residency requirements of your state you can contact your County Clerk where you

**Divorce Settlement Agreement: Draft** [Update preview](#)


Page: 1 of 1

\_\_\_\_\_ of \_\_\_\_\_, \_\_\_\_\_,  
 \_\_\_\_\_, born \_\_\_\_\_, and \_\_\_\_\_ of  
 \_\_\_\_\_,  
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1. JURISDICTION. \_\_\_\_\_ and \_\_\_\_\_  
 acknowledge they have both resided in \_\_\_\_\_ county for 0 years



IMAGE 3 - TEST

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### Divorce Settlement Agreement: Interview

PROGRESS 0%

**Have you already filed divorce papers with the court or will you file formal divorce papers with this agreement?**


*See the help topic to the right for more information.*

Initial divorce papers have already been filed


The initial divorce papers will be filed with this agreement

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### Divorce Settlement Agreement: Draft

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\_\_\_\_\_ of \_\_\_\_\_,  
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### Divorce Settlement Agreement: Interview

PROGRESS 1%

#### Who is starting this divorce action?

*If a Summons or Complaint has already been served, enter the name of the person who initiated the divorce action. If nothing has been started, either spouse can be named first.*

Husband

Wife

Name:

Address:

City:

State:

ZIP Code:

Date of Birth:  

Telephone Number:

Alternate Number:

Email Address:

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### Divorce Settlement Agreement: Interview

PROGRESS 2%

#### Who is the other spouse?

*Enter the name of the spouse served with divorce papers. If no action has started, the other spouse's name and address should be entered.*


Name:

Address:

City:

State:

ZIP Code:


Date of Birth:  

Telephone Number:

Alternate Number:


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IMAGE 6 - TEST

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### Divorce Settlement Agreement: Interview


PROGRESS 21%

#### What was the date and location of your marriage ceremony?

*Enter the city and state where you were married and the date. Enter the month, day and year (MM/DD/YYYY). Example: 05/14/2010*


City:


State:

Date of Marriage:  

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\_\_\_\_\_ of \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_,  
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### Divorce Settlement Agreement: Interview


PROGRESS 28%

**Are you and your spouse currently separated?**

Yes  
 No

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\_\_\_\_\_ of \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_,  
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javascript:\_\_\_doPostBack('ctl00\$ctl00\$SiteMasterBody\$RedDesignBody\$Interview\$btnNext','')

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### Divorce Settlement Agreement: Interview

PROGRESS 66%


#### Do you own a marital home?

*The marital home is the primary home the parties resided in together during the marriage. Select "Yes, with a mortgage" if you have purchased a marital home but still have loans or mortgages attached to the property.*


Yes, with a mortgage  
 Yes, free and clear of any debt  
 No, we do not own a marital home

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### Divorce Settlement Agreement: Interview


PROGRESS 91%

**Will Jane Doe get a legal name change after the divorce?**  
*Select "Yes" if Jane Doe will get a legal name change.*

Yes  
 No

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### Divorce Settlement Agreement: Interview

PROGRESS 98%


Where will Jane Doe sign this Agreement?

State:

County:

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\_\_\_\_\_ of \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_,  
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
**Where will John Doe sign this Agreement?**

State:

County:

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Ryan Nurmela, CEO QuantumCamp

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- Learn More
- Basic Legal Plan
- Learn More

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Confirm Username

Password

Confirm Password

### Billing Information

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Credit Card Type

Credit Card Number

Credit Card Security Code

Credit Card Expiration Date

Account Holder First Name

Account Holder Last Name

Company Name

Street Address

City

State

Postal Code

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### You will not be billed today

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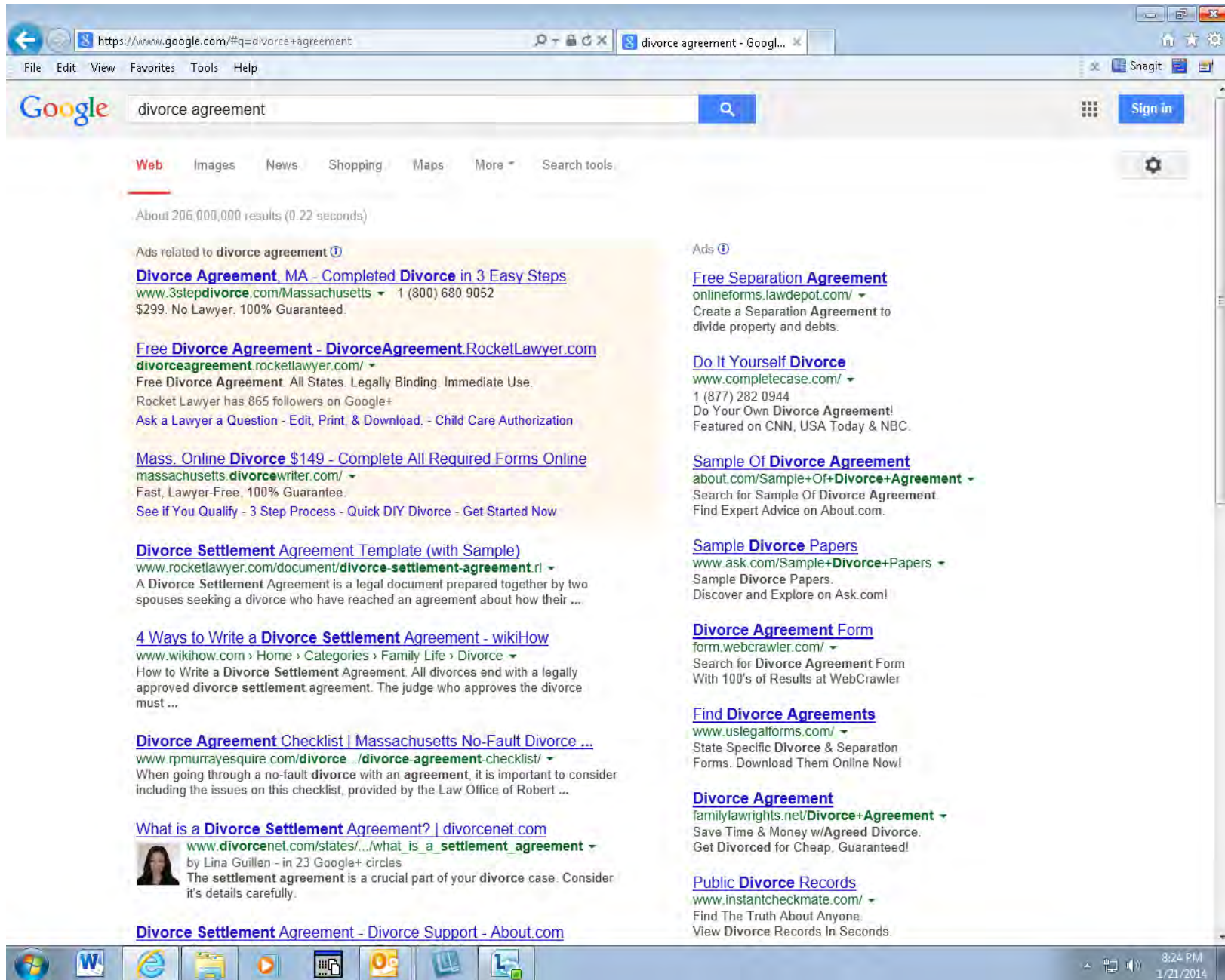
Call us Monday-Friday 6am-6pm PT

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# Make Your Free Divorce Settlement Agreement

### How it works:

 Build your document →  Save, Print & Share →  Sign it & make it legal!

**Start by selecting a state.**

California

#### Residency and Divorce

Residency refers to the length of time one or both of the parties have resided in a particular jurisdiction prior to filing for divorce. Each state has different residency requirements. In general, a state may require that one or both parties have resided in their state for at least 6 months before the state will consider granting a divorce. The residency requirement can be much longer. To find out the residency requirements of your state you can contact your County Clerk where you


**Divorce Settlement Agreement: Draft** [Update preview](#) Page: 1 of 1

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1. JURISDICTION. \_\_\_\_\_ and \_\_\_\_\_  
acknowledge they have both resided in \_\_\_\_\_ county for 0 years



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### Divorce Settlement Agreement: Interview

PROGRESS 0%

**Have you already filed divorce papers with the court or will you file formal divorce papers with this agreement?**


*See the help topic to the right for more information.*

Initial divorce papers have already been filed


The initial divorce papers will be filed with this agreement

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### Divorce Settlement Agreement: Interview

PROGRESS 1%

#### Who is starting this divorce action?

*If a Summons or Complaint has already been served, enter the name of the person who initiated the divorce action. If nothing has been started, either spouse can be named first.*

Husband  
 Wife


Name:

Address:

City:

State:

ZIP Code:

Date of Birth:  

Telephone Number:

Alternate Number:

Email Address:

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

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### Divorce Settlement Agreement: Interview

PROGRESS 2%

#### Who is the other spouse?

*Enter the name of the spouse served with divorce papers. If no action has started, the other spouse's name and address should be entered.*


Name:

Address:

City:

State:


ZIP Code:


Date of Birth:  

Telephone Number:

Alternate Number:


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### Divorce Settlement Agreement: Interview


PROGRESS 21%

#### What was the date and location of your marriage ceremony?

*Enter the city and state where you were married and the date. Enter the month, day and year (MM/DD/YYYY). Example: 05/14/2010*


City:

State:


Date of Marriage:  

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### Divorce Settlement Agreement: Interview

PROGRESS 28%

**Are you and your spouse currently separated?**

Yes  
 No

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\_\_\_\_\_ of \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_  
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IMAGE 8 - CONTROL

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### Divorce Settlement Agreement: Interview

PROGRESS 66%


#### Do you own a marital home?

*The marital home is the primary home the parties resided in together during the marriage. Select "Yes, with a mortgage" if you have purchased a marital home but still have loans or mortgages attached to the property.*


Yes, with a mortgage  
 Yes, free and clear of any debt  
 No, we do not own a marital home

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### Divorce Settlement Agreement: Draft

[Update preview](#) Page 1 of 1

\_\_\_\_\_ of \_\_\_\_\_,  
\_\_\_\_\_, born \_\_\_\_\_, and \_\_\_\_\_ of \_\_\_\_\_,  
born \_\_\_\_\_, being sworn do hereby state the following statements are true and correct and that except as otherwise specifically stated in this Agreement, this Agreement serves as a full and final settlement of all matters of joint concern for the parties, including all property rights, debts and spousal support. The parties agree this Agreement contains a fair, just and equitable division of property and debts and is satisfactory to both parties.

1. JURISDICTION \_\_\_\_\_ and \_\_\_\_\_

IMAGE 9 - CONTROL

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### Divorce Settlement Agreement: Interview


PROGRESS 91%

**Will Jane Doe get a legal name change after the divorce?**  
*Select "Yes" if Jane Doe will get a legal name change.*

Yes  
 No

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**Divorce Settlement Agreement: Draft** [Update preview](#) Page 1 of 6

\_\_\_\_\_ of \_\_\_\_\_,  
\_\_\_\_\_, born \_\_\_\_\_, and \_\_\_\_\_ of \_\_\_\_\_,  
born \_\_\_\_\_, being sworn do hereby state the following statements are true and correct and that except as otherwise specifically stated in this Agreement, this Agreement serves as a full and final settlement of all matters of joint concern for the parties, including all property rights, debts and spousal support. The parties agree this Agreement contains a fair, just and equitable division of property and debts and is satisfactory to both parties.

1. JURISDICTION. \_\_\_\_\_ and \_\_\_\_\_ acknowledge they have both resided in \_\_\_\_\_ county for 0 years and 0 months which satisfies the residency requirements of the State of \_\_\_\_\_

IMAGE 10 - CONTROL

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### Divorce Settlement Agreement: Interview

PROGRESS 98%


Where will Jane Doe sign this Agreement?

State:

County:

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### Divorce Settlement Agreement: Draft [Update preview](#)


Page 1 of 11

\_\_\_\_\_ of \_\_\_\_\_, \_\_\_\_\_, \_\_\_\_\_,  
\_\_\_\_\_, born \_\_\_\_\_, and \_\_\_\_\_ of  
\_\_\_\_\_, \_\_\_\_\_,  
born \_\_\_\_\_, being sworn do hereby state the following statements are true and  
correct and that except as otherwise specifically stated in this Agreement, this Agreement serves as  
a full and final settlement of all matters of joint concern for the parties, including all property rights,  
debts and spousal support. The parties agree this Agreement contains a fair, just and equitable  
division of property and debts and is satisfactory to both parties.

1. JURISDICTION. \_\_\_\_\_ and \_\_\_\_\_  
acknowledge they have both resided in \_\_\_\_\_ county for 0 years  
and 0 months which satisfies the residency requirements of the State of \_\_\_\_\_



IMAGE 11 - CONTROL

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### Divorce Settlement Agreement: Interview

PROGRESS 99%


**Where will John Doe sign this Agreement?**

State:

County:

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### Divorce Settlement Agreement: Draft [Update preview](#)

Page 7 of 9



\_\_\_\_\_ of \_\_\_\_\_, \_\_\_\_\_,  
\_\_\_\_\_, born \_\_\_\_\_, and \_\_\_\_\_ of  
\_\_\_\_\_, \_\_\_\_\_,  
born \_\_\_\_\_, being sworn do hereby state the following statements are true and  
correct and that except as otherwise specifically stated in this Agreement, this Agreement serves as  
a full and final settlement of all matters of joint concern for the parties, including all property rights,  
debts and spousal support. The parties agree this Agreement contains a fair, just and equitable  
division of property and debts and is satisfactory to both parties.

1. JURISDICTION. \_\_\_\_\_ and \_\_\_\_\_  
acknowledge they have both resided in \_\_\_\_\_ county for 0 years  
and 0 months which satisfies the residency requirements of the State of \_\_\_\_\_

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Create a password that's at least 6 characters long with symbols or numbers.

**Do you own or operate a business?**  Yes  No

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**VentureBeat**

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Ryan Nummela, CEO QuantumCamp

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Confirm Password

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Credit Card Security Code

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Account Holder Last Name

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Postal Code

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incorporation



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**Incorporation (business)** - Wikipedia, the free encyclopedia  
en.wikipedia.org/wiki/Incorporation\_(business)  
Incorporation (inc.) is the forming of a new corporation (a corporation being a legal entity that is effectively recognized as a person under the law)  
In the United States - In the United Kingdom - International perspective - See also

**Incorporation of the Bill of Rights** - Wikipedia, the free encyclopedia  
en.wikipedia.org/wiki/Incorporation\_of\_the\_Bill\_of\_Rights  
The incorporation of the Bill of Rights (or incorporation for short) is the process by which American courts have applied portions of the U.S. Bill of Rights to the ...  
History - Specific amendments - Reverse incorporation - References

**Incorporation** - Wikipedia, the free encyclopedia  
en.wikipedia.org/wiki/Incorporation  
Incorporation may refer to: Incorporation (business), the creation of a corporation;  
Incorporation (association), giving legal form to an association by registering it. ...

**Incorporation Services - Incorporate a Business | LegalZoom.com**  
www.legalzoom.com/legal-incorporation/incorporation-overview.html  
Learn about Incorporation for your business and find out how it can protect your personal assets from company liabilities at LegalZoom.com.

**incorporation - The Free Dictionary**  
www.thefreedictionary.com/incorporation  
in-corporate ( n-kor-p-r-t ) v. in-corporat-ing, in-corporat-es, v.tr.  
1. To unite (one thing) with something else already in existence: **incorporated** ...

**How to Incorporate | Register a Business - The Company Formation ...**  
www.shopify.com > Commerce Blog > How to Start a Business  
by Mark Hayes - in 55 Google+ circles  
Dec 14, 2012 - Many new online business owners aren't sure if they should incorporate, what their business structure options are, what **incorporation** might ...

**The Company Corporation: LLC & Incorporation - Small Business ...**  
https://www.incorporate.com/  
A provider of **incorporation** and start up services to small businesses. Includes information about corporation and LLC formations.

**Incorporate Or Form an LLC Online.. Incorporation Filing Services ...**  
www.mycorporation.com/  
MyCorporation makes it easy to incorporate a business or form an LLC online. Browse through our **incorporation** packages starting at \$69 today.

**Incorporation Definition | Investopedia**  
www.investopedia.com/terms/i/incorporate.asp  
The process of legally declaring a corporate entity as separate from its owners.  
Incorporation has many advantages for a business and its owners, including: 1) ...

**Incorporation Options - Incorporating a Business | BizFilings**  
www.bizfilings.com > Starting Your Business  
What does it mean to incorporate? Compare types of **incorporation**, LLC, S Corp, C Corp, and learn about incorporating a business with BizFilings.

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Image 2 - TEST



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Lisa Murphy, CA | Founder, Sosa Ketchup  
 Incorporated using Rocket Lawyer Oct 2011



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California

Start your incorporation  
 Answer a few questions. We'll take care of the rest.



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 Our specialists are standing by to give you the help you need.  
 (888) 627-1186



**Our promise.**  
 If you're not completely satisfied with your incorporation, we'll give you a full refund.

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“The site has been really user-friendly and has a wealth of information, but the biggest benefit of using Rocket Lawyer is peace of mind - it's priceless to us as a small business owner. I would definitely recommend Rocket Lawyer. I'd give it two yee-haws!

-Carol S.  
 Co-Founder of Farmyard Darlings

### What do I need to incorporate?






Incorporating your business isn't as complicated as most people think. All you need to get started are:


- Your name and address
- Your company's name and address
- A brief description of what you do

### How much does it cost?

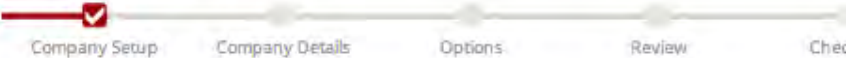
It's free to incorporate with Rocket Lawyer. All you pay are the fees in your state.

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## Incorporation: Interview



**Who will be the Primary Contact?**

All correspondence regarding the status of your incorporation will be sent to the primary contact. Usually this is the owner or incorporator of the company. Any shipping will also be done to the address provided.

First Name:

Last Name:

Business Address:  
Please enter a physical address. P.O. Boxes are not acceptable for filing.  
If your business is run out of your home, please list that address.


City:

State:

Zip Code:

Phone Number:  
Enter with the format 555-555-5555.






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


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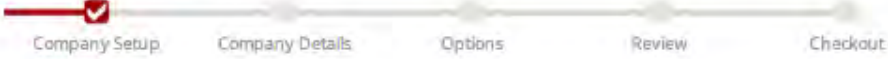


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### Incorporation: Interview



**Who will be the Primary Contact?**

All correspondence regarding the status of your incorporation will be sent to the primary contact. Usually this is the owner or incorporator of the company. Any shipping will also be done to the address provided.

First Name:

Last Name:

Business Address:  
Please enter a physical address. P.O. Boxes are not acceptable for filing.  
If your business is run out of your home, please list that address.  
*Please enter the address of the contact person.*

City:

State:

Zip Code:

Phone Number:  
Enter with the format 555-555-5555.

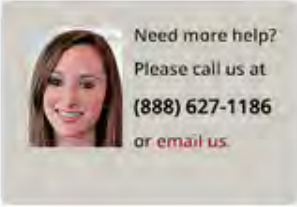


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### Incorporation: Interview

#### Please confirm your state and entity

**Select your entity type**

- LLC
- S-Corporation
- C-Corporation
- Non-Profit

If you need help at any point during the interview, feel free to call our incorporation specialists directly at 888-627-1186. We are happy to answer your questions.

**Select the state for filing**

California

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### Incorporation: Interview

Company Setup  | Company Details  | Options  | Review  | Checkout

#### Company Name

Enter your company or organization name:

Company designator:

#### Company Description

A short description of your business is needed to complete your application. For example: 'Providing IT consulting services' or 'Managing Real Estate'.

**Is the Primary Contact a Member of the LLC?**

Yes  
 No

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#### Help

[Enter your company or organization name:](#)  
[Company designator:](#)

**Enter your company or organization name:**

You may choose any name that is not likely to mislead the public and is not already in use. The name chosen must be distinguishable from any other corporate name which is already on file in the state in which you are filing.

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### Incorporation: Interview

**Are there additional members of your LLC you would like to identify?**

No  
 Yes

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### Incorporation: Interview

Company Setup  Company Details  Options  Review  Checkout

### Choose your processing option

**Our Rocket Lawyer Specialists have designed our plans to save you time and money. Choose your option below:**

**TRIAL PLAN (FREE\*)**


- Free one-week trial of the Rocket Lawyer Legal Plan\*
- Incorporation paperwork processing (\$99.95 value)

**PROCESSING ONLY (\$99.95)**

- Incorporation paperwork processing

\*Cancel anytime. After your one-week trial ends, you will be billed \$39.95 per month. You can see your full purchase summary including state filing fees on the checkout page.

Trial Plan  
 Processing Only



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“  
It was really easy and intuitive to incorporate my property management business with Rocket Lawyer. They gave me everything I needed, and it was a straightforward process.  
- Jerry, Lawrenceville

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### Incorporation: Interview

#### How fast do you need to file in your state?

Have questions? Call us at 888-627-1186 for help.

**California LLC**

State Filing Options:

- No rush. Just pay state government fees (\$90)**  
Standard processing time in California is 5 to 6 weeks. Cost includes the government fee plus \$5 for a certified copy of your Articles of Organization.
- Rush filing (\$500)**  
Want it FAST? No problem!  
You will receive electronic copies of your documents in 3 Business Days. Cost includes government fees, a rush filing fee and certified copy fee for your Articles of Organization. Additional time for mailing of documents may apply.

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### Incorporation: Interview

Company Setup  | Company Details  | Options  | Review  | Checkout

#### How would you like to get your new Tax ID number?

Please obtain my Tax ID for me (\$60).

I'll get my Tax ID on my own.

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Please call us at  
**(888) 627-1186**  
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#### Help

Most new businesses are required to have a federal tax identification number (also known as 'Tax ID' or 'EIN').

It is required if you plan to open a bank account, hire employees or report taxes to state and federal authorities.

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### Incorporation: Interview

#### Add these options to your incorporation order


**The Corporate Kit & Seal completes your business formation:**

- Personalized Corporate Kit & Seal (\$99)  
Includes stock certificates, company binder, personalized corporate seal, and sample business forms. The binder is enclosed in a matching slip-case and is custom embossed with your corporate name in gold on the spine.



- Personalized Corporate Seal Only (\$40)
- No thanks.

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## Incorporation: Interview

Company Setup
Company Details
Options
Review
Checkout

# Review your answers

Congratulations, you've completed the interview process. These answers will be used for all your official incorporation documents moving forward.

**First Name:** Test

**Last Name:** Test

**City:** San Francisco

**State:** California

**Zip Code:** 94104

**Phone Number:** 555-555-5555

**Business Address:** 123 Test St.

**Business Entity:** LLC

**State:** California

**Enter your company or organization name:** Swap Beat

**Company designator:** LLC

**Brief description of your business:** music

**Is the Primary Contact a Member of the LLC?** YES

**Are there additional members of your LLC you would like to identify?** NO


**Processing Option Selection:** Free Processing with Trial

**Registered agent selection:** Rocket Lawyer

**State Filing Options:** STANDARD

**Tax ID Selection:** MYSELF

**Corporate kit selection:** NONE



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IMAGE 14 - TEST

# Complete your order

**Purchase Summary**

Item: Rocket Lawyer Accelerate Plan  
State Government Fees - California



Trial \$90.00  
Total amount due: \$90.00

**Discount Code**

**Enter Your Billing Information**

First Name

Last Name

Card Number   

Expiration Date: Month  Year

Security Code  [What is this?](#)

Billing Zip

Phone Number 555-555-5555



**Your credit card is safe and secure**  
This site utilizes SSL (Secure Socket Layers) and 128-bit encryption to protect all information you provide us.



**Why do we ask for a security code?**  
It's for your protection. We want to make sure that the person providing the credit card information is in possession of the credit card.

By continuing, I confirm that I have read and understand the [Terms & Conditions](#), [Privacy Policy](#) and [Email Policy](#). If you have enrolled in a free trial, we will begin regular billing of \$59.95/month after your free trial ends at the end of 7 days. Downgrade to a free membership to discontinue the membership and monthly billing.

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**Incorporation (business) - Wikipedia, the free encyclopedia**  
[en.wikipedia.org/wiki/Incorporation\\_\(business\)](http://en.wikipedia.org/wiki/Incorporation_(business))  
**Incorporation** (Inc.) is the forming of a new corporation (a corporation being a legal entity that is effectively recognized as a person under the law).  
 In the United States - In the United Kingdom - International perspective - See also

**Incorporation of the Bill of Rights - Wikipedia, the free encyclopedia**  
[en.wikipedia.org/wiki/Incorporation\\_of\\_the\\_Bill\\_of\\_Rights](http://en.wikipedia.org/wiki/Incorporation_of_the_Bill_of_Rights)  
 The **incorporation** of the Bill of Rights (or **incorporation** for short) is the process by which American courts have applied portions of the U.S. Bill of Rights to the ...  
 History - Specific amendments - Reverse incorporation - References

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[en.wikipedia.org/wiki/Incorporation](http://en.wikipedia.org/wiki/Incorporation)  
**Incorporation** may refer to: **Incorporation** (business), the creation of a corporation;  
**Incorporation** (association), giving legal form to an association by registering it ...

**Incorporation Services - Incorporate a Business | LegalZoom.com**  
[www.legalzoom.com/legal-incorporation/incorporation-overview.html](http://www.legalzoom.com/legal-incorporation/incorporation-overview.html)  
 Learn about **incorporation** for your business and find out how it can protect your personal assets from company liabilities at LegalZoom.com.

**incorporation - The Free Dictionary**  
[www.thefreedictionary.com/incorporation](http://www.thefreedictionary.com/incorporation)  
 in-corporate (n-kor-p-r-i-t), v. in-corpor-ated, in-corpor-ating, in-corpor-ates, v.tr.  
 1. To unite (one thing) with something else already in existence: **incorporated** ...

**How to Incorporate | Register a Business - The Company Formation ...**  
 [www.shopify.com](http://www.shopify.com) | Ecommerce Blog | How to Start a Business  
 by Mark Hayes - in 55 Google+ circles  
 Dec 14, 2012 - Many new online business owners aren't sure if they should incorporate, what their business structure options are, what **incorporation** might ...

**The Company Corporation: LLC & Incorporation - Small Business ...**  
<https://www.incorporate.com/>  
 A provider of **incorporation** and start up services to small businesses. Includes information about corporation and LLC-formations.

**Incorporate Or Form an LLC Online, Incorporation Filing Services ...**  
[www.mycorporation.com/](http://www.mycorporation.com/)  
 MyCorporation makes it easy to incorporate a business or form an LLC online. Browse through our **incorporation** packages starting at \$69 today.

**Incorporation Definition | Investopedia**  
[www.investopedia.com/terms/i/incorporate.asp](http://www.investopedia.com/terms/i/incorporate.asp)  
 The process of legally declaring a corporate entity as separate from its owners.  
**Incorporation** has many advantages for a business and its owners, including: 1) ...

**Incorporation Options - Incorporating a Business | BizFilings**  
[www.bizfilings.com](http://www.bizfilings.com) | Starting Your Business  
 What does it mean to incorporate? Compare types of **incorporation**, LLC, S Corp, C Corp, and learn about incorporating a business with BizFilings.

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**California Incorporation**  
[www.directincorporation.com/](http://www.directincorporation.com/)  
 1 (877) 281 6496  
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[www.wyomingcompany.com/](http://www.wyomingcompany.com/)  
 Check out the Top Advantages of **incorporation** in Wyoming Instead.

**Incorporate Your Business**  
[www.califilings.com/](http://www.califilings.com/)  
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We make your incorporation easy

Personal guidance for every stage of your business.

Select Your State

**Get started**

Want help? Call us at 888-627-1186

Lisa Murphy, CA | Founder, Sesa Ketchup  
Incorporated using Rocket Lawyer Oct 2011

WALL STREET JOURNAL The New York Times BusinessWeek Bloomberg Forbes

### How it Works

Tell us about your business

We file all the paperwork for you

You're done! We'll email your documents to you.

**Start your incorporation**

Answer a few questions. We'll take care of the rest.

California

**Get started**

### Got a question? Give us a call.

Our specialists are standing by to give you the help you need.

**(888) 627-1186**

### Our promise.

If you're not completely satisfied with your incorporation, we'll give you a full refund.

**100% SATISFACTION GUARANTEE**  
Our Promise

### Who uses Rocket Lawyer?

"The site has been really user-friendly and has a wealth of information, but the biggest benefit of using Rocket Lawyer is peace of mind - it's priceless to us as a small business owner. I would definitely recommend Rocket Lawyer. I'd give it two yee-haws!"

-Carol S.  
Co-Founder of Farmyard Darlings

### What do I need to incorporate?






Incorporating your business isn't as complicated as most people think. All you need to get started are:


- Your name and address
- Your company's name and address
- A brief description of what you do

### How much does it cost?

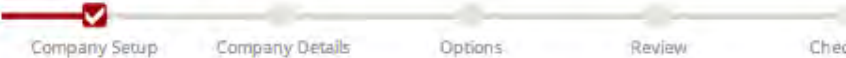
It's free to incorporate with Rocket Lawyer. All you pay are the fees in your state.

IMAGE 3 – CONTROL

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## Incorporation: Interview



**Who will be the Primary Contact?**

All correspondence regarding the status of your incorporation will be sent to the primary contact. Usually this is the owner or incorporator of the company. Any shipping will also be done to the address provided.

First Name:

Last Name:


Business Address:  
Please enter a physical address. P.O. Boxes are not acceptable for filing.  
If your business is run out of your home, please list that address.

City:

State:






Zip Code:


Phone Number:  
Enter with the format 555-555-5555.



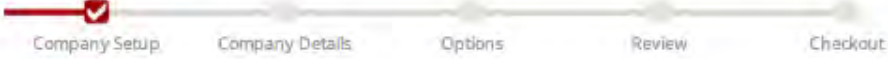
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## Incorporation: Interview



**Who will be the Primary Contact?**

All correspondence regarding the status of your incorporation will be sent to the primary contact. Usually this is the owner or incorporator of the company. Any shipping will also be done to the address provided.

First Name:

Last Name:


Business Address:  
Please enter a physical address. P.O. Boxes are not acceptable for filing.  
If your business is run out of your home, please list that address.  
*Please enter the address of the contact person.*

City:

State:

Zip Code:

Phone Number:  
Enter with the format 555-555-5555.



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### Incorporation: Interview

#### Please confirm your state and entity

**Select your entity type**

- LLC
- S-Corporation
- C-Corporation
- Non-Profit

If you need help at any point during the interview, feel free to call our incorporation specialists directly at 888-627-1186. We are happy to answer your questions.

**Select the state for filing**

California

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### Incorporation: Interview

Company Setup  Company Details  Options  Review  Checkout

#### Company Name

Enter your company or organization name:

Company designator

#### Company Description

A short description of your business is needed to complete your application. For example: 'Providing IT consulting services' or 'Managing Real Estate'.

**Is the Primary Contact a Member of the LLC?**

Yes  
 No

Need more help?  
Please call us at  
**(888) 627-1186**  
or email us.

#### Help

[Enter your company or organization name:](#)  
[Company designator:](#)

**Enter your company or organization name:**

You may choose any name that is not likely to mislead the public and is not already in use. The name chosen must be distinguishable from any other corporate name which is already on file in the state in which you are filing.

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### Incorporation: Interview

**Are there additional members of your LLC you would like to identify?**

No  
 Yes

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### Incorporation: Interview

Company Setup  Company Details  Options  Review  Checkout

## Choose your processing option

**Our Rocket Lawyer Specialists have designed our plans to save you time and money. Choose your option below:**

**TRIAL PLAN (FREE\*)**

- Free one-week trial of the Rocket Lawyer Legal Plan\*
- Incorporation paperwork processing (\$99.95 value)

**PROCESSING ONLY (\$99.95)**

- Incorporation paperwork processing

\*Cancel anytime. After your one-week trial ends, you will be billed \$39.95 per month. You can see your full purchase summary including state filing fees on the checkout page.

Trial Plan  
 Processing Only

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Please call us at  
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“It was really easy and intuitive to incorporate my property management business with Rocket Lawyer. They gave me everything I needed, and it was a straightforward process.”

- Jerry, Lawrenceville

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### Incorporation: Interview

Company Setup  | Company Details  | Options  | Review  | Checkout

## How fast do you need to file in your state?

Have questions? Call us at 888-627-1186 for help.

**California LLC**

State Filing Options:

- No rush. Just pay state government fees (\$90)**  
Standard processing time in California is 5 to 6 weeks. Cost includes the government fee plus \$5 for a certified copy of your Articles of Organization.
- Rush filing (\$500)**  
Want it FAST? No problem!  
You will receive electronic copies of your documents in 3 Business Days. Cost includes government fees, a rush filing fee and certified copy fee for your Articles of Organization. Additional time for mailing of documents may apply.

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### Incorporation: Interview

Company Setup  | Company Details  | Options  | Review  | Checkout

#### How would you like to get your new Tax ID number?

Please obtain my Tax ID for me (\$60).

I'll get my Tax ID on my own.

Need more help?  
Please call us at  
**(888) 627-1186**  
or [email us](#).

#### Help

Most new businesses are required to have a federal tax identification number (also known as 'Tax ID' or 'EIN').

It is required if you plan to open a bank account, hire employees or report taxes to state and federal authorities.

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### Incorporation: Interview



### Add these options to your incorporation order

#### The Corporate Kit & Seal completes your business formation:

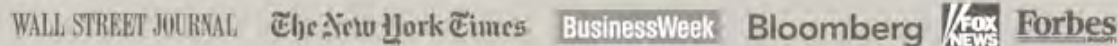
- Personalized Corporate Kit & Seal (\$99)  
Includes stock certificates, company binder, personalized corporate seal, and sample business forms. The binder is enclosed in a matching slip-case and is custom embossed with your corporate name in gold on the spine.



- Personalized Corporate Seal Only (\$40)
- No thanks.

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## Review your answers

Congratulations, you've completed the interview process. These answers will be used for all your official incorporation documents moving forward.

<b>First Name:</b>	Test
<b>Last Name:</b>	Test
<b>City:</b>	San Francisco
<b>State:</b>	California
<b>Zip Code:</b>	94104
<b>Phone Number:</b>	555-555-5555
<b>Business Address:</b>	123 Test St.
<b>Business Entity:</b>	LLC
<b>State:</b>	California
<b>Enter your company or organization name:</b>	Swap Beat
<b>Company designator</b>	LLC
<b>Brief description of your business:</b>	music
<b>Is the Primary Contact a Member of the LLC?</b>	YES
<b>Are there additional members of your LLC you would like to identify?</b>	NO
<b>Processing Option Selection:</b>	Free Processing with Trial
<b>Registered agent selection:</b>	Rocket Lawyer
<b>State Filing Options:</b>	STANDARD
<b>Tax ID Selection:</b>	MYSELF
<b>Corporate kit selection:</b>	NONE

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Trial  
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Last Name

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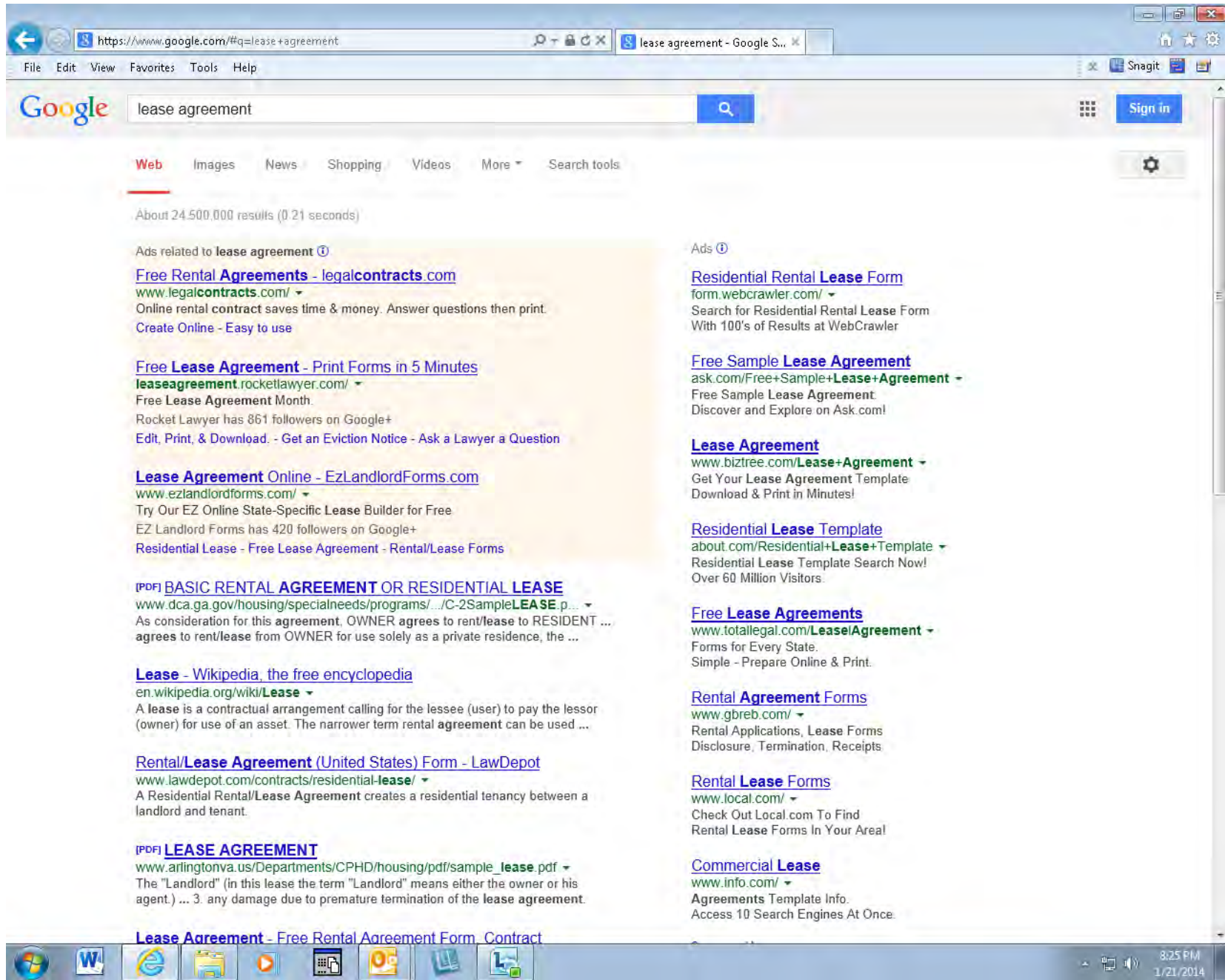
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### Lease Agreement: Interview

PROGRESS 0%

#### What is the address of the Property being leased?

*For example: 123 A Avenue - Apt. 5B, Sacramento, California, 12345-1234.*

Address:

City:


County:

State:

ZIP Code:

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**Lease Agreement: Draft** [Update preview](#) Page 1 of 13

### REAL ESTATE LEASE

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### Lease Agreement: Interview

PROGRESS 2%

#### Who is the Landlord?

Enter the name of the Landlord as you want it to appear on the Lease document. The Landlord may be an individual or a company.

Landlord:

Address:

City:

State:

ZIP Code:

Phone:

Check here to include a second Landlord.

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### Lease Agreement: Interview

**PROGRESS 8%**


#### Who is the Tenant?


*The tenant is the person who will reside at the address on the lease.*

Tenant:

2nd Tenant:

3rd Tenant:

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**Lease Agreement: Draft**  Page 4 of 13






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### Lease Agreement: Interview

PROGRESS 17%


#### How often will Lease payments be made?


Select the first option if Lease payments will be paid once per month. For any other schedule, select the second option.

Monthly

Weekly, quarterly, semi-annually, etc.

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**Lease Agreement: Interview**

**PROGRESS 22%**

**How may Lease payments be made?**

Select all those that apply.

- Cash
- Personal check
- Money order
- Cashier's check
- Other

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### Lease Agreement: Interview

PROGRESS 50%

**If the Tenant is allowed to stay on the property after the lease, how much is the required Lease payment?**

*Select the appropriate option. The "holdover" period is any period of time after the end of the Lease.*

The most recent payment amount

A percentage of the most recent payment amount (for example, 150%)

Do not include a holdover provision

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### Lease Agreement: Interview


PROGRESS 67%


**Will the Tenant have some maintenance responsibilities?**

*The Lease provides that the Landlord will be primarily responsible for maintenance. Select "Yes" to give specified responsibilities to the Tenant.*

Yes

No

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**Lease Agreement: Draft**  Page 4 of 11

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### Lease Agreement: Interview

PROGRESS 77%

#### How will the late fee be determined?

Select the option that best describes how the Tenant will be charged for late payments. \*reminder: you may click the "Continue" button to skip this question and return to it later if this information is not handy.

- Flat amount charged once
- Flat amount charged daily until paid
- Percentage of the late payment charged once
- No late fee will be charged

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### Lease Agreement: Interview


PROGRESS 91%

#### Was the Property built prior to 1978?

*If the property was built prior to 1978, Federal law requires the Landlord to provide lead-based paint information to the Tenant before the lease is signed. You may find this information on the property deed or mortgage document. \*reminder: you may click the "Continue" button to skip this question and return to it later if this information is not handy.*

Yes  
 No

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## REAL ESTATE LEASE

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### Lease Agreement: Interview

PROGRESS 99%

#### Who will sign the Disclosure of Information on Lead-Based Paint?

*Check all parties that will sign the Disclosure. The interview assumes that each Tenant will sign the Disclosure.*

- Landlord
- Co-Landlord
- Agent or Manager
- Additional Agent or Manager

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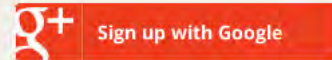
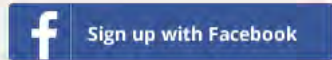
**2. TERM.** The lease term will begin on \_\_\_\_\_ ("Commencement Date") and will

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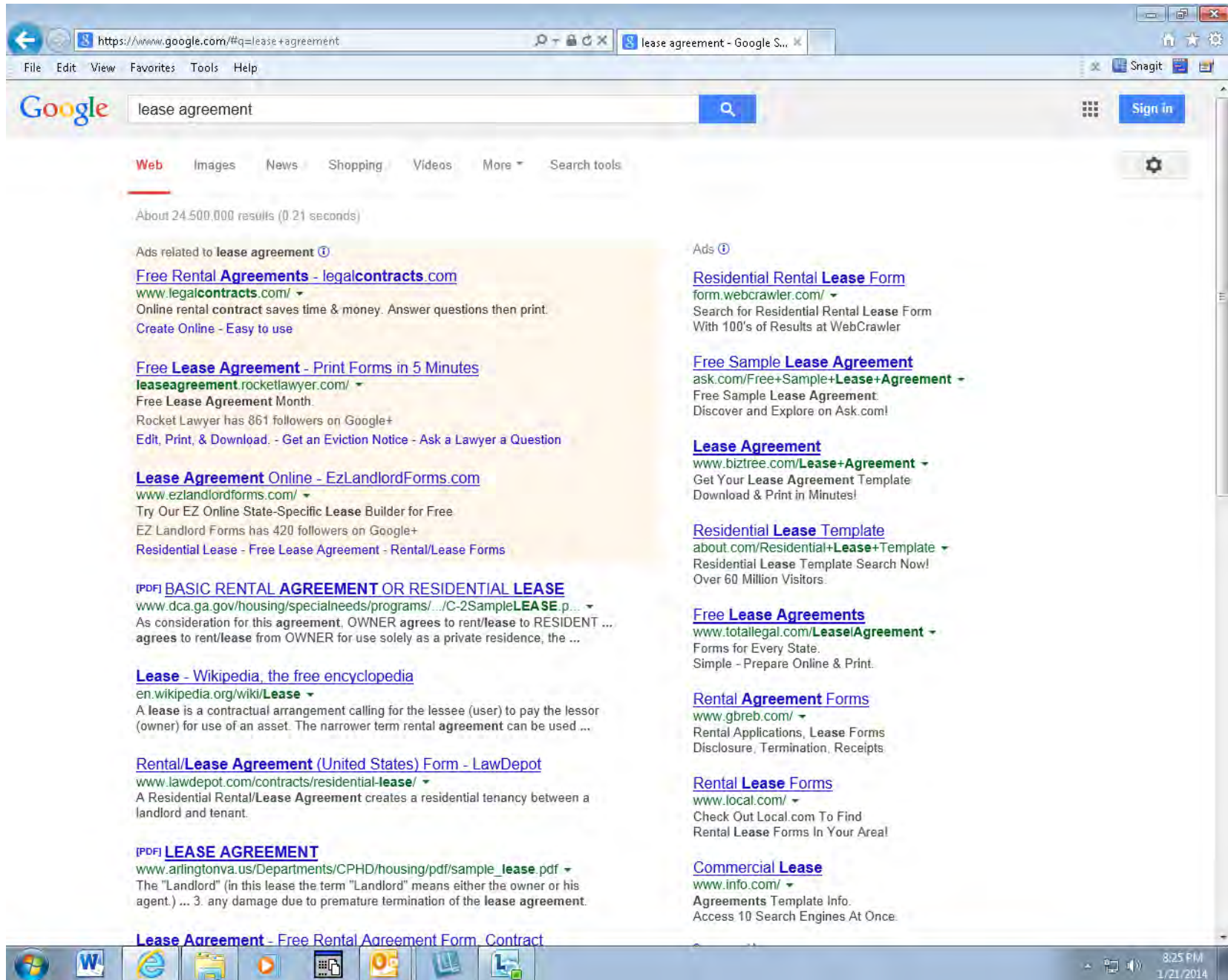
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### Lease Agreement: Interview

PROGRESS 0%

#### What is the address of the Property being leased?

*For example: 123 A Avenue - Apt. 5B, Sacramento, California, 12345-1234.*

Address:

City:

County:

State:

ZIP Code:

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**PROGRESS 2%**

#### Who is the Landlord?

Enter the name of the Landlord as you want it to appear on the Lease document. The Landlord may be an individual or a company.

Landlord:

Address:

City:

State:

ZIP Code:

Phone:

Check here to include a second Landlord.

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**Lease Agreement: Interview**

**PROGRESS 8%**


**Who is the Tenant?**


*The tenant is the person who will reside at the address on the lease.*

Tenant:

2nd Tenant:

3rd Tenant:

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### Lease Agreement: Interview

PROGRESS 17%

#### How often will Lease payments be made?

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Weekly, quarterly, semi-annually, etc.

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**Lease Agreement: Interview**

PROGRESS 50%

**If the Tenant is allowed to stay on the property after the lease, how much is the required Lease payment?**

*Select the appropriate option. The "holdover" period is any period of time after the end of the Lease.*

The most recent payment amount

A percentage of the most recent payment amount (for example, 150%)

Do not include a holdover provision

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**1. PREMISES.** Landlord, in consideration of the lease payments provided in this Lease, leases to Tenant \_\_\_\_\_ (the "Premises") located at \_\_\_\_\_, \_\_\_\_\_, No other portion of the building (hereinafter, the Building), wherein the Premises is located is included unless expressly provided for in this Agreement.

**2. TERM.** The lease term will begin on \_\_\_\_\_ ("Commencement Date") and will terminate on \_\_\_\_\_, and thereafter shall be month-to-month on the same terms

IMAGE 8 - CONTROL

**ROCKETLAWYER.**      Hello, Jane  
Trial Account

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### Lease Agreement: Interview

PROGRESS 67%


**Will the Tenant have some maintenance responsibilities?**


*The Lease provides that the Landlord will be primarily responsible for maintenance. Select "Yes" to give specified responsibilities to the Tenant.*

Yes

No

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**Lease Agreement: Draft** [Update preview](#) Page 4 of 11

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IMAGE 9 - CONTROL

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### Lease Agreement: Interview

PROGRESS 77%

#### How will the late fee be determined?

Select the option that best describes how the Tenant will be charged for late payments. \*reminder: you may click the "Continue" button to skip this question and return to it later if this information is not handy.

- Flat amount charged once
- Flat amount charged daily until paid
- Percentage of the late payment charged once
- No late fee will be charged

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**Lease Agreement: Draft** [Update preview](#) Page 1 of 13

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IMAGE 10 - CONTROL

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### Lease Agreement: Interview

PROGRESS 91%

#### Was the Property built prior to 1978?

*If the property was built prior to 1978, Federal law requires the Landlord to provide lead-based paint information to the Tenant before the lease is signed. You may find this information on the property deed or mortgage document. \*reminder: you may click the "Continue" button to skip this question and return to it later if this information is not handy.*

Yes  
 No

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**Lease Agreement: Draft** [Update preview](#) Page 1 of 13

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IMAGE 11 - CONTROL

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### Lease Agreement: Interview

PROGRESS 99%

#### Who will sign the Disclosure of Information on Lead-Based Paint?

*Check all parties that will sign the Disclosure. The interview assumes that each Tenant will sign the Disclosure.*

- Landlord
- Co-Landlord
- Agent or Manager
- Additional Agent or Manager

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**Lease Agreement: Draft** [Update preview](#) Page 1 of 13

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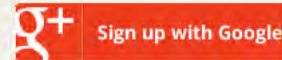
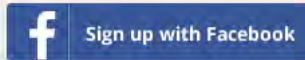
**2. TERM.** The lease term will begin on \_\_\_\_\_ ("Commencement Date") and will

# Save and continue on to your document!

[Return to interview](#)

## Sign up

## Sign in



Email\*

Password\*

Create a password that's at least 6 characters long with symbols or numbers.

Do you own or operate a business?  Yes  No

By continuing, I confirm that I have read and understand the [Terms and Conditions](#), [Privacy Policy](#), [On Call Terms of Service](#), and [Email Policy](#)

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IMAGE 13 - CONTROL

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Credit Card Security Code

Credit Card Expiration Date

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We use maximum encryption so that your personal information is safe and secure.

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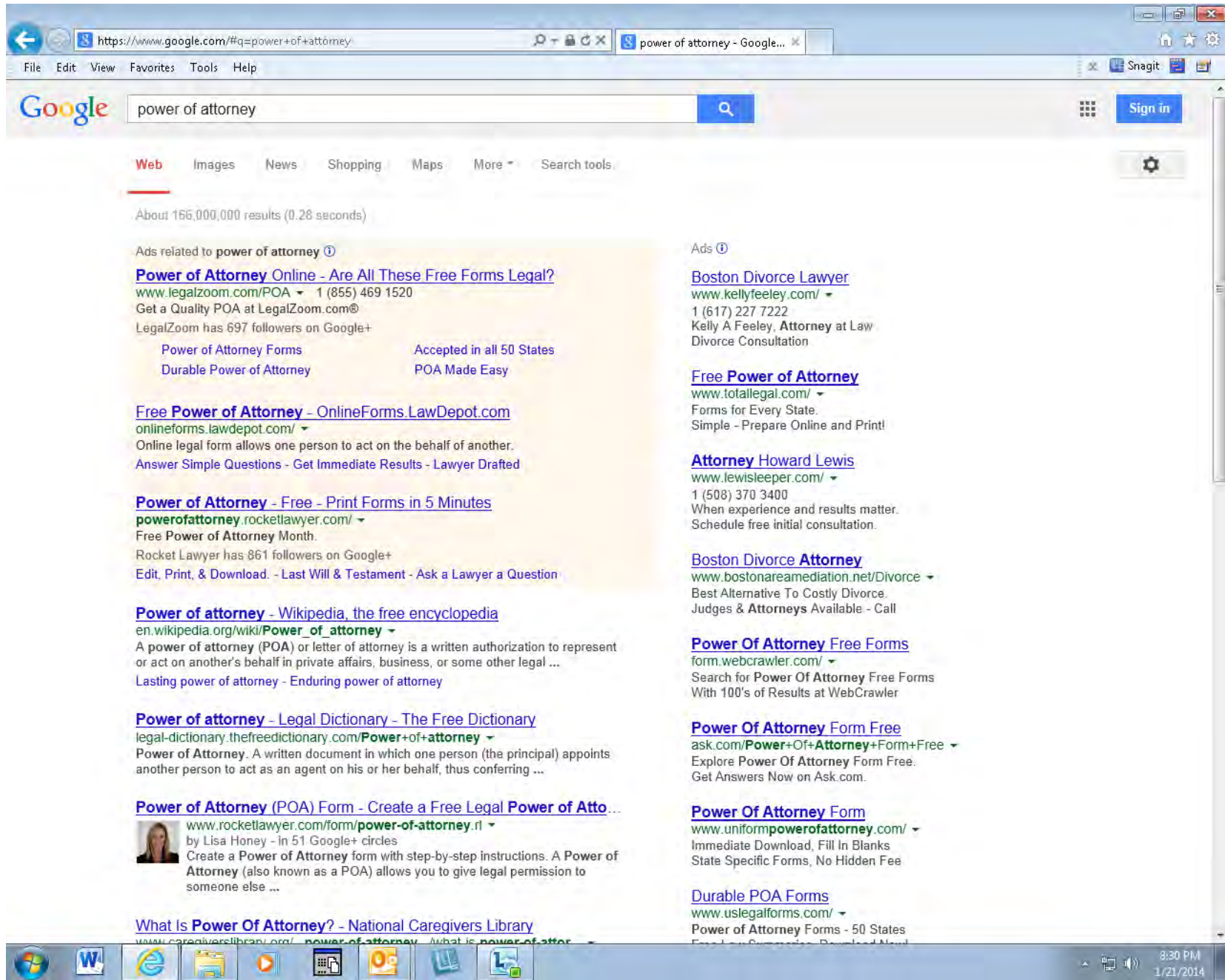
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8:30:27 PM 1/21/2014



Legal Documents & Legal Forms > Power of Attorney

# Power of Attorney



When you need a little help making big decisions, a Power of Attorney (also known as a POA) allows you to give legal permission to someone else to act on your behalf. You can give someone the ability to write checks, sign official documents or handle other legal matters on your behalf. Whether you're going to be unavailable, or you want to prepare for unexpected illness or incapacity, create a Power of Attorney to make sure the right person makes decisions for you.

**Create your Power of Attorney now.**  
It only takes about 10 minutes to complete.

California  [Get started](#)

## Use a Power of Attorney if:

- You want to grant authority to someone to act on your behalf in your absence.
- You want to grant authority to someone to act on your behalf in the event you become incapacitated.
- You want to grant authority to someone to act on your behalf in specific situation.



[View Sample](#)

## Sample Power of Attorney

More than just a template, our step-by-step interview process makes it easy to create a Power of Attorney

Save, sign, print, and download your document when you are done.

This document is sometimes called a Durable Power of Attorney

Other names for a Power of Attorney:

## Who it's for

- Estate Planner
- +
- Heirs and Executor

## How we make it simple

- Answer easy questions to build a custom contract.
- Ask a lawyer to look it over if you have any questions.
- Sign it and store your work securely.


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*Susan S.  
Rocket Lawyer Customer*

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### California Power of Attorney: Interview

PROGRESS 0%

#### Who is this Power of Attorney being created for?

*For example: Kathleen J. Parker, 555 Main Street, Chicago, Illinois, 60610. The person named in the Power of Attorney who's giving authority to someone else is called the "Principal."*

Name:

Address:

City:


State:


ZIP Code:

Save this information in my account profile

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### ***DURABLE POWER OF ATTORNEY***

#### **Notice to Person Executing Durable Power of Attorney**

A durable power of attorney is an important legal document. By signing the durable power of attorney, you are authorizing another person to act for you, the principal. Before you sign this durable power of attorney, you should know these important facts:

Your agent (attorney-in-fact) has no duty to act unless you and your agent agree otherwise in writing. This document gives your agent the powers to manage, dispose of, sell, and convey your real and personal property, and to use your property as security if your agent borrows money

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### California Power of Attorney: Interview

**PROGRESS** 10%


**Would you like your Agent to act on your behalf in all situations or only in specific situations?**

*If you give your Agent the authority to act for you in all situations, then you are granting a General Power of Attorney. If you authorize your Agent to act only in specific situations, then you are granting a Special Power of Attorney.*

All situations  
 Specific situations

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Your agent will have the right to receive reasonable payment for services provided under this durable power of attorney unless you provide otherwise in this power of attorney.

IMAGE 5 - TEST

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### California Power of Attorney: Interview

**PROGRESS** 11%

**Do you want your Agent to have access to your medical records?**


*Due to new health information privacy laws, your Agent may not be allowed access to your medical records unless specifically given the authority. Your Agent may need this access to dispute or verify charges when paying your medical bills and submitting insurance claims.*

Yes

No

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The powers you give your agent will continue to exist for your entire lifetime, unless you

IMAGE 6 - TEST

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**California Power of Attorney: Interview**


PROGRESS 52%

**Will your Agent have the power to change the beneficiaries on your accounts?**

*If you select "No," your Agent will be able to manage your accounts but will not be allowed to alter any beneficiary designations you've previously made.*

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The powers you give your agent will continue to exist for your entire lifetime, unless you state that the durable power of attorney will last for a shorter period of time or unless you otherwise terminate the durable power of attorney. The powers you give your agent in this durable

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**California Power of Attorney: Interview**

PROGRESS: 68%


**Will your Agent be allowed to make gifts on your behalf?**

Select "Yes" if you want your Agent to have this power. For example, you may allow your Agent to make gifts to family members or charitable organizations you have given to before.

Yes  
 No

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IMAGE 8 - TEST

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### California Power of Attorney: Interview

PROGRESS 63%


**Will your Agent be allowed to transfer assets into your revocable trust?**

*If you have already established a revocable (living) trust, select "Yes" if you want to allow your Agent to transfer assets into the trust.*

Yes  
 No

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IMAGE 9 - TEST

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**California Power of Attorney: Interview**

PROGRESS 77%


**Would you like to appoint an agent (Digital Agent) to manage your digital assets?**

*Digital Assets refer to online accounts, such as email accounts or social-networking sites, or files saved on computers or servers, as well as any kind of digital property. Select "No" if you do not own any digital assets.*

Yes  
 No

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IMAGE 10 - TEST

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**California Power of Attorney: Interview**

PROGRESS 83%


**Do you want to make this document a Durable Power of Attorney?**

*A "Durable Power of Attorney" remains effective even if you become disabled or lack the mental competence to understand and handle your financial and personal affairs.*

Yes  
 No

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IMAGE 11 - TEST

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### California Power of Attorney: Interview

PROGRESS 96%

#### When will this Power of Attorney terminate?


Choose when you want this Power of Attorney to be terminated.


Upon your death

On the specific date:

MM/YY

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## Sign in



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Password\*

Create a password that's at least 6 characters long with symbols or numbers.

Do you own or operate a business?  Yes  No

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\*prepaid for 1 year

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Ryan Nurmela, CEO QuantumCamp

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- ✓ **Unlimited access** to create and edit thousands of trusted legal documents
- ✓ **Safe and Secure online storage** for your legal documents in one convenient location

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Required fields are indicated by \*

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Username (Email Address)

Confirm Username

Password

Confirm Password

## Billing Information

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Credit Card Type

Credit Card Number

Credit Card Security Code

Credit Card Expiration Date

Account Holder First Name

Account Holder Last Name

Company Name

Street Address

City

State

Postal Code

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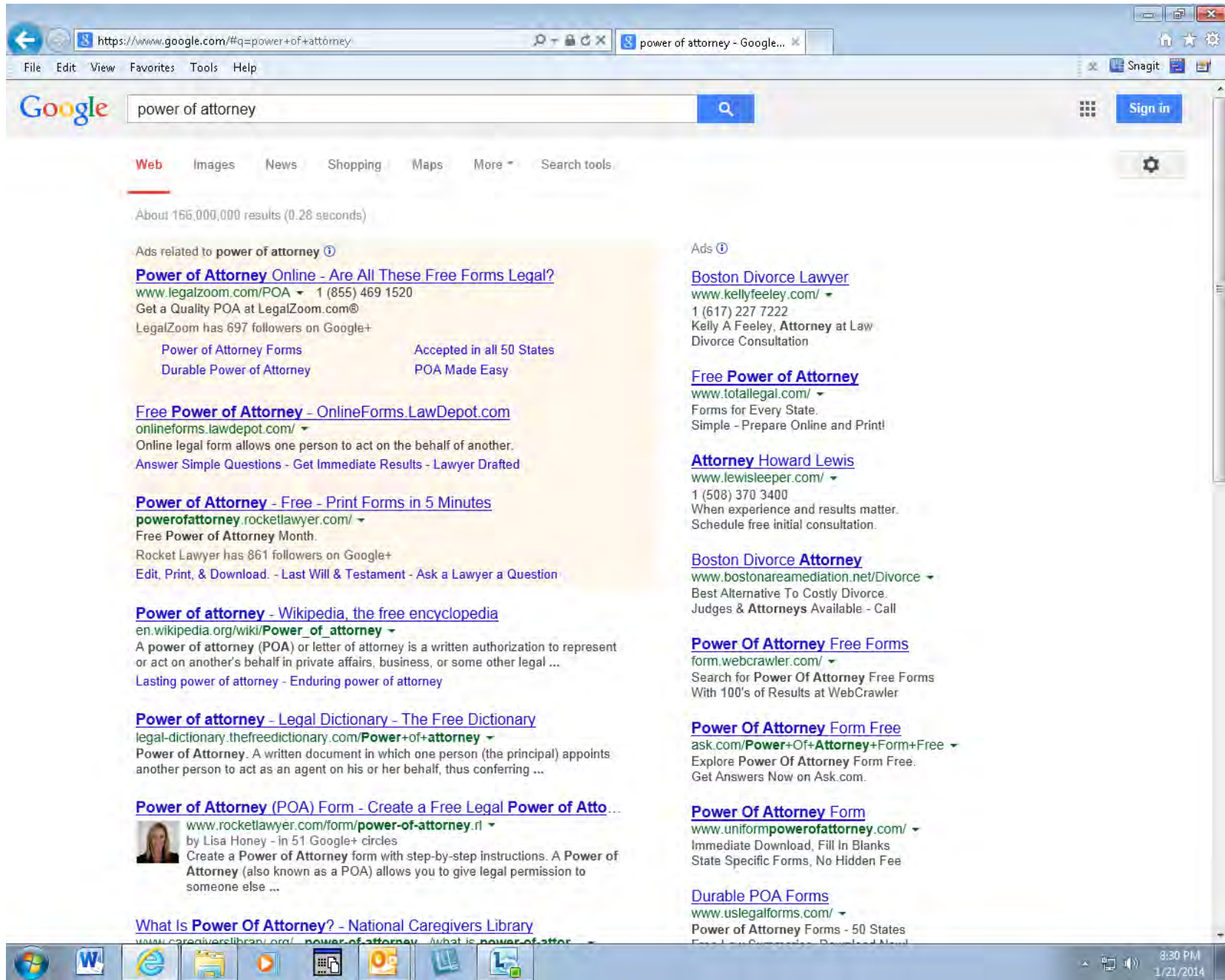
(877) 881-0947

Call us Monday-Friday 6am-6pm PT

Email Us

CONTROL

IMAGE 1 - CONTROL



8:30:27 PM 1/21/2014

Legal Documents & Legal Forms > Power of Attorney

# Power of Attorney



When you need a little help making big decisions, a Power of Attorney (also known as a POA) allows you to give legal permission to someone else to act on your behalf. You can give someone the ability to write checks, sign official documents or handle other legal matters on your behalf. Whether you're going to be unavailable, or you want to prepare for unexpected illness or incapacity, create a Power of Attorney to make sure the right person makes decisions for you.

**Create your Power of Attorney now.**  
It only takes about 10 minutes to complete.

California

[Get started](#)

## Use a Power of Attorney if:

- You want to grant authority to someone to act on your behalf in your absence.
- You want to grant authority to someone to act on your behalf in the event you become incapacitated.
- You want to grant authority to someone to act on your behalf in specific situation.



[View Sample](#)

## Sample Power of Attorney



More than just a template, our step-by-step interview process makes it easy to create a Power of Attorney

Save, sign, print, and download your document when you are done.




This document is sometimes called a Durable Power of Attorney

Other names for a Power of Attorney:

## Who it's for

-  Estate Planner
- +
-  Heirs and Executor

## How we make it simple

-  **Answer easy questions** to build a custom contract.
-  **Ask a lawyer to look it over** if you have any questions.
-  **Sign it** and store your work securely.

## What people are saying




It was so quick and easy to use. I started my legal document, customized it and had it ready to review and sign in just a few minutes.

*Susan S.  
Rocket Lawyer Customer*



IMAGE 3 - CONTROL

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### California Power of Attorney: Interview

PROGRESS 0%

#### Who is this Power of Attorney being created for?

*For example: Kathleen J. Parker, 555 Main Street, Chicago, Illinois, 60610. The person named in the Power of Attorney who's giving authority to someone else is called the "Principal."*

Name

Address


City


State

ZIP Code

Save this information in my account profile

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**California Power of Attorney: Draft** [Update preview](#) Page 3 of 11


### ***DURABLE POWER OF ATTORNEY***

#### **Notice to Person Executing Durable Power of Attorney**

A durable power of attorney is an important legal document. By signing the durable power of attorney, you are authorizing another person to act for you, the principal. Before you sign this durable power of attorney, you should know these important facts:

Your agent (attorney-in-fact) has no duty to act unless you and your agent agree otherwise in writing. This document gives your agent the powers to manage, dispose of, sell, and convey your real and personal property, and to use your property as security if your agent borrows money

IMAGE 4 - CONTROL

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**California Power of Attorney: Interview**

**PROGRESS** 10%


**Would you like your Agent to act on your behalf in all situations or only in specific situations?**

*If you give your Agent the authority to act for you in all situations, then you are granting a General Power of Attorney. If you authorize your Agent to act only in specific situations, then you are granting a Special Power of Attorney.*

All situations  
 Specific situations

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Your agent will have the right to receive reasonable payment for services provided under this durable power of attorney unless you provide otherwise in this power of attorney.

IMAGE 5 - CONTROL

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### California Power of Attorney: Interview

**PROGRESS** 11%

**Do you want your Agent to have access to your medical records?**


*Due to new health information privacy laws, your Agent may not be allowed access to your medical records unless specifically given the authority. Your Agent may need this access to dispute or verify charges when paying your medical bills and submitting insurance claims.*

Yes

No

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Your agent will have the right to receive reasonable payment for services provided under this durable power of attorney unless you provide otherwise in this power of attorney.

The powers you give your agent will continue to exist for your entire lifetime, unless you

IMAGE 6 - CONTROL

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**California Power of Attorney: Interview**


PROGRESS 52%

**Will your Agent have the power to change the beneficiaries on your accounts?**

*If you select "No," your Agent will be able to manage your accounts but will not be allowed to alter any beneficiary designations you've previously made.*

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Your agent will have the right to receive reasonable payment for services provided under this durable power of attorney unless you provide otherwise in this power of attorney.

The powers you give your agent will continue to exist for your entire lifetime, unless you state that the durable power of attorney will last for a shorter period of time or unless you otherwise terminate the durable power of attorney. The powers you give your agent in this durable

IMAGE 7 - CONTROL

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**California Power of Attorney: Interview**

PROGRESS: 68%


**Will your Agent be allowed to make gifts on your behalf?**

Select "Yes" if you want your Agent to have this power. For example, you may allow your Agent to make gifts to family members or charitable organizations you have given to before.

Yes  
 No

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The powers you give your agent will continue to exist for your entire lifetime, unless you

IMAGE 8 - CONTROL

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**California Power of Attorney: Interview**

PROGRESS 63%


**Will your Agent be allowed to transfer assets into your revocable trust?**

*If you have already established a revocable (living) trust, select "Yes" if you want to allow your Agent to transfer assets into the trust.*

Yes  
 No

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IMAGE 9 - CONTROL

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**California Power of Attorney: Interview**

PROGRESS 77%


**Would you like to appoint an agent (Digital Agent) to manage your digital assets?**

*Digital Assets refer to online accounts, such as email accounts or social-networking sites, or files saved on computers or servers, as well as any kind of digital property. Select "No" if you do not own any digital assets.*

Yes  
 No

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Your agent will have the right to receive reasonable payment for services provided under this durable power of attorney unless you provide otherwise in this power of attorney.

The powers you give your agent will continue so long as you are alive, unless you

IMAGE 10 - CONTROL

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**California Power of Attorney: Interview**

PROGRESS 83%


**Do you want to make this document a Durable Power of Attorney?**

*A "Durable Power of Attorney" remains effective even if you become disabled or lack the mental competence to understand and handle your financial and personal affairs.*

Yes  
 No

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The powers you give your agent will continue to exist for your entire lifetime, unless you



IMAGE 11 - CONTROL

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### California Power of Attorney: Interview

PROGRESS 96%

#### When will this Power of Attorney terminate?


Choose when you want this Power of Attorney to be terminated.


Upon your death

On the specific date:

MM/YY

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# Save and continue on to your document!

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## Sign up

## Sign in

 Sign up with Facebook

 Sign up with Google

Email\*

Password\*

Create a password that's at least 6 characters long with symbols or numbers.

Do you own or operate a business?  Yes  No

By continuing, I confirm that I have read and understand the [Terms and Conditions](#), [Privacy Policy](#), [On Call Terms of Service](#), and [Email Policy](#)

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"Rocket Lawyer provides citizens with the right documentation to tackle some of the most common legal problems."




**VentureBeat**

IMAGE 13 - CONTROL


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<p><b>Monthly Legal Plan</b></p> <ul style="list-style-type: none"> <li>Get documents reviewed for free after 90 days.</li> <li>Create as many new legal documents as you want.</li> </ul>	<p><b>\$17.95</b> Per Month</p>
<p><b>Annual Legal Plan</b> <small>Best Deal</small></p> <ul style="list-style-type: none"> <li>Get instant access to free document reviews from local attorneys.</li> <li>Create as many legal documents as you can.</li> </ul>	<p><b>\$9.99*</b> Per Month <small>*prepaid for 1 year</small></p>

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Ryan Nurmela, CEO QuantumCamp

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- ✓ **Free e-signature service** to execute legal contracts quickly and paperlessly
- ✓ **Unlimited access** to create and edit thousands of trusted legal documents
- ✓ **Safe and Secure online storage** for your legal documents in one convenient location

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Draft

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No thanks, I'll take the **read-only version** of my document.

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Password

Confirm Password

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Credit Card Type

Credit Card Number

Credit Card Security Code

Credit Card Expiration Date

Account Holder First Name

Account Holder Last Name

Company Name

Street Address

City

State

Postal Code

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***APPENDIX F***

***APPENDIX F***



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- I want to convert an existing business

I want to form my Corporation in:

Select a State

[Get Started](#)

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- [What are the main differences between a C corporation and an S corporation?](#)
- [Who can form a corporation?](#)
- [Do I need an attorney to form a corporation?](#)
- [What is the procedure for forming a corporation, and what legal documents are required?](#)

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Monday–Friday  
5:00am - 8:00pm PT  
  
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*Excellent service. I continue to be a completely satisfied customer and we have used LegalZoom for starting a corporation...and have always been impressed with the service.*

*Karin L., Glendale, CA*

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\* Available in most states. After the 30-day trial period, benefits to the Business Legal Plan (also Business Advantage Pro) continue automatically for \$29.99 per month. For states where Business Advantage Pro is not available, benefits to Business Advantage Standard continue automatically for \$7.99. You can cancel by calling (877) 818-8787. For full details, see the [Legal Plan Contract](#) and [Advantage Terms of Service](#).



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emails about your benefits, which continue until  
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- Attorney advice on running your  
business. Covers company  
management, liability protection,  
employees, business contracts and  
more
- Attorney consultations on an  
unlimited number of new legal  
matters
- Tax advice from tax professionals at  
Corporate Tax Network
- Attorney-drafted letter on your behalf  
(at attorney's discretion)
- Legal document review (up to 10  
pages)
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Number, and 24/7 email alerts to  
changes to your company's credit  
scores and ratings by Dun &  
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<b>The LLC packages include:</b>			
Preliminary LLC name clearance	✓	✓	✓
Filing of Articles of Organization	✓	✓	✓
Personalized operating agreement	✓	✓	✓
Indemnification clause	✓	✓	✓
Clause governing restrictions on transfer	✓	✓	✓
Company resolution for banking	✓	✓	✓
LegalZoom Peace of Mind Review™	✓	✓	✓
The LegalZoom business newsletter (includes business tips, discounts and more)	✓	✓	✓
Deluxe LLC Kit embossed with your company name		✓	✓
Official company seal		✓	✓
20 customized membership certificates	Blank Partnership Certificates (up to 10)	✓	✓
Membership transfer ledger		✓	✓
 <b>FREE</b> online PR and social media suite for 1 year — a \$179 value		✓	✓
 QuickBooks Online Accounting Software for Small Business — 3 Months <b>FREE</b> (a \$119 value)			✓
Priority Rush service, typically 7-10 business days or less (vs. 20-35 business days for our regular service)			✓
Federal Tax ID (EIN) application preparation			✓
Two-day delivery of final package			✓
<b>Business Advantage Pro 30-day trial***</b> After the 30-day trial period, benefits will continue automatically for \$29.99 per month. Cancel at any time with no further obligation by calling (877) 818-8787. We'll send you periodic emails about your benefits, which continue until canceled. <b>Program includes:</b>			✓
<ul style="list-style-type: none"> <li>■ Attorney advice on running your business. Covers company management, liability protection, employees, business contracts and more</li> </ul>			✓
<ul style="list-style-type: none"> <li>■ Attorney consultations on an unlimited number of new legal matters</li> </ul>			✓
<ul style="list-style-type: none"> <li>■ Tax advice from tax professionals at Corporate Tax Network</li> </ul>			✓
			✓

### Questions?

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### Calculate Your State Filing Fee: (required)\*

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Select a State

Economy / Standard	(select state)
Express Gold	(select state)

### Optional Services

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Complete & Obtain Tax ID from IRS	\$79.00	-\$30 Savings with Gold Package
Registered Agent Fee**	\$159.00	
Annual Compliance Calendar Subscription	\$69.00	Included in Registered Agent
Professional LLCs	\$50.00	
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Amendments, Foreign Qualification and other services	<a href="#">Click here</a> for details	

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***APPENDIX G***

***APPENDIX G***



GLOBAL MARKET RESEARCH

120 Fifth Avenue, New York, NY 10011

Tel 212.633.1100 | Fax 212.633.2696

**ONLINE LEGAL SERVICES STUDY**

**- ONLINE SCREENER QUESTIONNAIRE -**

<p><b>TALLY GENDER:</b></p> <table border="1"> <tr> <td><b><u>GENDER</u></b></td> </tr> <tr> <td>MALE</td> </tr> <tr> <td>FEMALE</td> </tr> </table>	<b><u>GENDER</u></b>	MALE	FEMALE	<p><b>TALLY AGE:</b></p> <table border="1"> <tr> <td>18-24</td> </tr> <tr> <td>25-34</td> </tr> <tr> <td>35-44</td> </tr> <tr> <td>45-54</td> </tr> <tr> <td>55-64</td> </tr> <tr> <td>65+</td> </tr> </table>	18-24	25-34	35-44	45-54	55-64	65+	<p><b>TALLY DEVICE:</b></p> <table border="1"> <tr> <td><b><u>DEVICES</u></b></td> </tr> <tr> <td>Computer or Laptop</td> </tr> <tr> <td>iPad or Tablet</td> </tr> <tr> <td>Web-enabled Television or Smart TV</td> </tr> <tr> <td>Cell Phone or Smart Phone or iPhone</td> </tr> <tr> <td>Palm Device</td> </tr> <tr> <td>Other</td> </tr> </table>	<b><u>DEVICES</u></b>	Computer or Laptop	iPad or Tablet	Web-enabled Television or Smart TV	Cell Phone or Smart Phone or iPhone	Palm Device	Other
<b><u>GENDER</u></b>																		
MALE																		
FEMALE																		
18-24																		
25-34																		
35-44																		
45-54																		
55-64																		
65+																		
<b><u>DEVICES</u></b>																		
Computer or Laptop																		
iPad or Tablet																		
Web-enabled Television or Smart TV																		
Cell Phone or Smart Phone or iPhone																		
Palm Device																		
Other																		

**PN: N=400 TOTAL. QUOTAS ACROSS 6 CELLS - 4 'INCORPORATION' CELLS:**  
**CELL 1 N=75 BIZ PANEL TEST**  
**CELL 2 N=75 BIZ PANEL CONTROL**  
**CELL 3 N=25 CONSUMER PANEL TEST**  
**CELL 4 N=25 CONSUMER PANEL CONTROL**  
**2 CONSUMER LEGAL SERVICE CELLS:**  
**CELL 5 N=100 CONSUMER/BIZ PANEL TEST (N=25/SERVICE)**  
**CELL 6 N=100 CONSUMER/BIZ PANEL CONTROL (N=25/SERVICE)**

**TALLY REGION:**

<b><u>REGION</u></b>
Northeast
South
Midwest
West

**FOR PROGRAMMING:**  
**BALANCE REGION TO CENSUS AMONG BIZ PANEL CELLS**  
**BALANCE AGE (18-34, 35-64, 65+), GENDER AND REGION TO CENSUS AMONG CONSUMER PANEL CELLS**  
**NEED TO BALANCE BY DEMOS ACROSS CELLS- I.E. 1/2; 3/4/5/6**

**FOR FIELD:**  
**NEED REPRESENTATIVE SAMPLE**  
**CLICK BALANCE REGION TO CENSUS AMONG BIZ PANEL**  
**CLICK BALANCE AGE GENDER AND REGION TO CENSUS AMONG CONSUMER PANEL**

**PN: NEED TO ALSO TALLY IF NOT Q1A (Punch 1), Q2/Q4a (RL) IN BOTH BIZ AND CONSUMER CELLS**

**INTRODUCTION:**

Thank you for your interest in today's survey. We are sure that you will find the questions interesting and enjoyable to answer.

**HIDDEN QUESTION TO TRACK BUSINESS AND CONSUMER PANELS****PN: ADD IN "CAPTCHA" AND INSTRUCTIONS**

First, we'd like to ask you a few questions to make sure the survey will be relevant to you.

S1. Do you or does anyone else in your household work for any of the following types of companies?  
(SELECT ALL THAT APPLY)

RANDOMIZE PUNCHES 1-6

- 1 A marketing research firm or department **(TERMINATE)**
- 2 An advertising agency **(TERMINATE)**
- 3 A public relations agency **(TERMINATE)**
- 4 Media company such as radio, newspaper, TV, etc. **(CONTINUE)**
- 5 An internet company such as Google, Yahoo!, Twitter, Facebook, Amazon, eBay, etc.  
**(CONTINUE)**
- 6 A law firm or a company that deals with giving legal advice, including online law services companies **(TERMINATE)**
- 7 None of the above **(CONTINUE) (EXCLUSIVE)**

S2. In the past three months have you taken part in any of the following types of market research surveys? **(SELECT ALL THAT APPLY)**

**RANDOMIZE**

- 1 Online legal services **(TERMINATE)**
- 2 Personal Care **(CONTINUE)**
- 3 Food Brands or Products **(CONTINUE)**
- 4 Healthcare **(CONTINUE)**
- 5 Technology **(CONTINUE)**
- 6 None of the above **(EXCLUSIVE. ANCHOR) (CONTINUE)**
- 7 None, I haven't taken a market research survey in the past 3 months **(EXCLUSIVE. ANCHOR) (CONTINUE)**

**TERMINATE IF PUNCH 1 AT S2**

**ASK CONSUMERS ONLY**

S3. Please record your gender below. **(SINGLE PUNCH)**

- 1 Male
- 2 Female

**ASK CONSUMERS ONLY**

S4. Which of the following categories includes your age?

- 1 Under 18 **[TERMINATE IMMEDIATELY]**
- 2 18-24
- 3 25-34
- 4 35-44
- 5 45-54
- 6 55-64
- 7 65 or older
- 99 Prefer Not to Answer **[TERMINATE]**

**ASK ALL**

S5. Please indicate the state in which you reside.

**(PULL DOWN LIST) (PN: INCLUDE HIDDEN SCREEN TO CHECK REGION)  
(AUTO-CODE REGION)**

<b>TALLY REGIONS:</b>	
Northeast.....	01
South.....	02
Midwest.....	03
West.....	04

**CONFIDENTIALITY AGREEMENT**

Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows.

S6. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey.

Do you agree or disagree? **(SINGLE PUNCH)**

- 1 I Agree
- 2 I Disagree **(TERMINATE)**

**(PN: MUST AGREE AT S6 – PUNCH 1, OTHERWISE TERMINATE.)**

S7. Which of the following best describes your employment status?

- 1 Employed full-time
- 2 Employed part-time
- 3 Self employed
- 4 Retired
- 5 Temporarily unemployed
- 6 Homemaker
- 7 Student
- 8 Prefer not to answer

**IF PUNCH 1 OR 2 AT S7 ASK S8a**

S8a. Which of the following best describes your position with your company? (Select one)

- 1 Owner/Proprietor
- 2 Executive
- 3 Upper Management
- 4 Middle Management
- 5 Intermediate level
- 6 Entry Level
- 7 Some other level

**DO NOT ASK S8b IF 'OWNER/PROPRIETOR' AT S8a**

S8b. Do you have any aspirations or plans to start your own company/business?

- 1 Yes
- 2 No

**ASK ALL**

S9. Over the past few years, have you looked on the internet for online legal services? (Select one.)

- 1 Yes **(ASK S10a - S10e)**
- 2 No **(SKIP TO S11a)**
- 3 I don't know **(SKIP TO S11a)**

**IF PUNCH 1 AT S9 ASK S10a - S10d**

S10a. What specific legal services have you looked for online? (Select all that apply.)

**RANDOMIZE**

- 1 Incorporation/forming a business or organization
- 2 Family law (such as prenuptial agreement, divorce agreement, marriage certificate request letter, etc.)
- 3 Bill of sale (such as general bill of sale, automobile bill of sale, boat bill of sale, etc.)
- 4 Landlord/tenant matters (such as lease agreement, eviction notice, rental application, etc.)
- 5 Estate planning (such as living will, power of attorney, last will and testament, etc.)
- 6 Some Other type of legal service

**ASK S10b-1 IF PUNCH 6 AT S10a THEN ASK S11a**

S10b. Please tell us the specific type of online legal service company or companies you have looked for online.

---

99 I don't know/don't remember

S10c. Did you actually purchase online legal services for **[INSERT RESPONSE FROM S10a]** from one of these online legal companies you were looking at? (Select one.)

- 1 Yes
- 2 No **(SKIP TO NEXT RESPONSE FROM S10a, WHEN FINISHED GO TO S11a)**

**ASK ALL**

S11a. On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months? (Select one.)

Definitely will Not	Probably will not	May or may not	Probably will	Definitely will
1	2	3	4	5

**ASK S11b IF PUNCH 3, 4 OR 5 AT S11a**

S11b. Specifically, what types of online legal services will you be looking for? (Select all that apply.)

**RANDOMIZE**

- 1 Incorporation/forming a business or organization
- 2 Family law (such as prenuptial agreement, divorce agreement, marriage certificate request letter, etc.)
- 3 Bill of sale (such as general bill of sale, automobile bill of sale, boat bill of sale, etc.)
- 4 Landlord/tenant matters (such as lease agreement, eviction notice, rental application, etc.)
- 5 Estate planning (such as living will, power of attorney, last will and testament, etc.)
- 6 Some Other type of legal service

**ASK S11c IF PUNCH 6 AT S11b**

S11c. Please tell us the specific type of online legal service company or companies you will be looking for.

---

99 I don't know/don't remember

**ASK IF INTERESTED IN 'INCORPORATION' (PUNCH 1) AT S10a OR S11b**

S12. In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

- 1 I am or would be the primary decision maker
- 2 I share or would share this responsibility with others
- 3 Someone else is or would be the primary decision maker



S13a. Please tell us what kind of device you are taking this survey on.

**RANDOMIZE**

- 1 Computer or Laptop **(CONTINUE)**
- 2 iPad or Tablet **(CONTINUE)**
- 3 Web-enabled Television or Smart TV **(CONTINUE)**
- 4 Cell Phone or Smart Phone or iPhone **(ASK 13b)**
- 5 Palm Device **(ASK 13b)**
- 6 Other **(ANCHOR) (ASK 13b)**

**ASK S13b IF PUNCH 4, 5, 6 AT S13a**

S13b. Throughout the rest of this survey, we will be asking you to look at images that require a larger screen in order to review. Would you be willing to come back to this survey link, when you are able to use a device with a larger screen (e.g. a computer/laptop)?

- 1 Yes **(LEAVE SURVEY AS INCOMPLETE-RESTART AT S13a)**
- 2 No **(TERMINATE)**

**PN: QUALIFICATIONS - PLACE IN THE FOLLOWING 6 CELLS DEPENDING ON PANEL AND QUALIFYING AT S8a/b, S9, S10a AND S11a/S11b, S12, S13...**

- **CELL 1 N=75 BIZ TEST AND CELL 2 N=75 BIZ CONTROL (N=150 TOTAL):**
  - HIDDEN QUESTION - BUSINESS PANEL
  - PUNCH 1 AT S8a; OR PUNCH 1 AT S8b
  - MUST PUNCH 1 AT S9 AND PUNCH 1 AT S10a; OR MUST PUNCH 3, 4, 5 AT S11a AND PUNCH 1 AT S11b
  - MUST PUNCH 1 OR 2 AT S12
- **CELL 3 N=25 CONSUMER/BIZ TEST AND CELL 4 N=25 CONSUMER/BIZ CONTROL (N=50 TOTAL):**
  - HIDDEN QUESTION - CONSUMER PANEL
  - PUNCH 1 AT S8a; OR PUNCH 1 AT S8b
  - MUST PUNCH 1 AT S9 AND PUNCH 1 AT S10a; OR MUST PUNCH 3, 4, 5 AT S11a AND PUNCH 1 AT S11b
  - MUST PUNCH 1 OR 2 AT S12
- **CELL 5 N=100 CONSUMER (NON-BIZ) TEST AND CELL 6 N=100 CONSUMER (NON-BIZ) CONTROL (N=200 TOTAL):**
  - MUST PUNCH 1 AT S9 AND PUNCH 2-5 AT S10a; OR MUST PUNCH 3, 4, 5 AT S11a AND PUNCH 2-5 S11b

**- ONLINE MAIN QUESTIONNAIRE - BUSINESS-  
ASK 'INCORPORATION' FOR BUSINESS PANEL (N=75 EACH) AND CONSUMER PANEL (N=25 EACH)**

**INTRODUCTION:**

We are conducting a survey about online legal services for people interested in **[INSERT: forming a business]**.

We value your opinions and all of your answers will be held in the strictest confidence, so do not be afraid to answer each question honestly. Remember, there are no right or wrong answers.

Please do not search or ask others for help regarding any questions, we are only interested in your own opinions. If you don't know the answer, that is okay, please select "Don't Know" and move forward to the next question. Do not guess your answer.

- 1a. When you were interested in looking for online legal services, how did you go about finding what services are available? (Select all that apply.)

**RANDOMIZE. TALLY AND MONITOR ALL PUNCHES AT Q1a**

- 1 Used an internet search engine
- 2 Used a phone book
- 3 Asked friends/family
- 4 Asked colleagues
- 5 Spoke to a lawyer
- 6 Other (Specify) **(ANCHOR)**
- 7 **Didn't have to** --- I already knew of a name and just went directly to the site **(ANCHOR. EXCLUSIVE)**
- 8 I don't know **(ANCHOR. EXCLUSIVE)**

**IF PUNCH 1 AT Q1a ASK Q1b-1, OTHERWISE ASK Q1c.**

- 1b. Which search engine did you use to look for online legal services? (Select all that apply.)

**RANDOMIZE. TALLY AND MONITOR ALL PUNCHES AT Q1b**

- 1 Google
- 2 Yahoo
- 3 Bing
- 4 AOL
- 5 Ask
- 6 Other (Specify) **(ANCHOR)**

**IF NOT PUNCH 1 AT Q1a ASK Q1c.**

- 1c. Have you considered using a Google or other search engines to look for online legal services? (Select one.)

**TALLY AND MONITOR ALL PUNCHES AT Q1c**

- 1 Yes **(CONTINUE)**
- 2 No **(SKIP TO THE END OF THE SURVEY)**
- 3 I don't know **(SKIP TO THE END OF THE SURVEY)**

**EXECUTE EARLY EXIT:  
IF DO NOT SELECT 'YES' AT Q1c**

Let's assume that you are considering **[INSERT: forming a business]** and are exploring using online legal service to help you do it. Also assume that as part of your search you used Google to search for **"[INSERT: Incorporation]"**. Please review this search page as you normally would...

**NEW SCREEN****[INSERT GOOGLE SEARCH RESULTS IMAGE ALONE]****PN: INSERT TIMING DEVICE FOR THIS SCREEN****NEW SCREEN**

2. **[INSERT GOOGLE SEARCH RESULTS IMAGES TO SELECT, WITH OPTION TO VIEW IMAGE AGAIN]**

After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see? (Select all that apply.)

**[LIST THE COMPANIES BASED ON GOOGLE RESULTS. SELECT ALL THAT APPLY. TALLY ALL COMPANIES]**

**Please review this page and then scroll down and click the grey "Next" button to continue. ASK Q3a-b FOR EACH RESPONSE FROM Q2**

3a. Why did you select this **[INSERT COMPANY FROM Q2]**? (Please be as specific as possible)

---

3b. Anything else?

---

**ALWAYS ASK Q4a**

4a. Which, if any, other companies that you did not originally select would you be interested in exploring further?

**(INSERT COMPANIES THAT DID NOT SELECT AT Q2 WITH 'NONE' AS LAST CHOICE)**

99 None **(ANCHOR)**

**IF ROCKET LAWYER OR LEGAL ZOOM IS NOT CHOSEN FOR Q2, BUT WAS CHOSEN FOR Q4a, INSERT 'initially' IN B4b. PRIORITIZE ROCKET LAWYER, LEGALZOOM, AND ONE OTHER RANDOM COMPANY. INSERT RANDOM COMPANY IF ROCKET LAWYER OR LEGALZOOM WERE NOT SELECTED AT Q2 AND/OR Q4a.**

B4b. Please tell us why you did not [*'initially'*1] select [COMPANY 1]?

[INSERT 'GOOGLE AD' 1]

---

Now, please tell us why you did not [*'initially'*2] select [COMPANY 2]?

[INSERT 'GOOGLE AD' 2]

---

**ASK B5a IF ROCKET LAWYER NOT SELECTED AT Q2 OR Q4a**

B5a. Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

- 1 Yes
- 2 No
- 3 I don't know

**IF PUNCH 1 AT Q5a ASK Q5b**

B5b. Thinking back to the Google search page, Please tell us what you recall about the Rocket Lawyer ad. (Please be as specific as possible)

---

**ASK Q5c IF ROCKET LAWYER NOT SELECTED AT Q2 OR Q4a**

5c. Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

- 1 Yes **(CONTINUE)**
- 2 No **(SKIP TO END OF SURVEY)**
- 3 I don't know **(SKIP TO END OF SURVEY)**

**TALLY THOSE WHO DO NOT SELECT RL AT Q2/Q4a**

**EXECUTE EARLY EXIT:  
IF DO NOT SELECT 'YES' AT Q5c**

**STIMULI QUESTION INTRO****PN: INSERT TIMING DEVICE FOR THIS SECTION**

Let's assume that when you were going over the Google search results you clicked on the Rocket Lawyer web site as a potential provider of online legal **[INSERT: Incorporation]** services.

We are going to show you a number of screen images from their web site. Please review the content on these screen images the way you normally would if you were looking for online **[INSERT: Incorporation]** services and deciding if you want to use the services of this company.

There is no need to insert the requested information on each screen, just review this as an illustrative example. Make sure you get all the information you need from each page and then proceed to the next page.

**[INSERT 'INCORPORATION' STIMULI]**

**AT THE BOTTOM OF EACH STIMULI PAGE ASK Q6a**

6a. Did you get the information you need from this page to help you make a decision? If not, please review the page again.

- 1 Yes, I have reviewed this page

**AFTER RESPONDENT GOES THROUGH THE STIMULI IN FULL ASK 7**

B7. Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about their **Incorporation offer**? (Please be as specific as possible)

---

B8. Anything else?

---

B9. You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

- 1 Yes
- 2 No
- 3 **I don't know**

B10a. Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free offer?

- 1 Yes
- 2 No
- 3 **I don't know**

**IF PUNCH 1 AT Q10a ASK Q10b-1 - Q10b-2**

B10b-1. Do you know if this state fee applies . . . (select one)

**ROTATE PUNCHES 1-4**

- 1 ...to all businesses that you want to incorporate regardless of how you chose to file your incorporation papers
- 2 ...only if you incorporate online
- 3 ...only if you drop off the incorporation papers at the state's office
- 4 ...only if you mail in your incorporation papers
5. **I don't know (ANCHOR)**

B10b-2. Do you know if this state fee applies... (Select one)

**ROTATE PUNCHES 1-3**

- 1 ...only if you incorporate through this particular online legal services company
- 2 ...if you incorporate through this and some other online legal services companies but not all online legal services companies
- 3 ...if you incorporate through any online legal services company
- 4 **I don't know (ANCHOR)**

B11. Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

1. Yes
2. No
3. **I don't know**

**DO NOT ASK Q12a IF PUNCH 2 AT QB11**

12a. Do you recall if the free trial offer has a time limit?

- 1 Yes
- 2 No
- 3 I don't know

**IF PUNCH 1 AT Q12a ASK Q12b-c**

12b. What happens after the free trial period? (Please be as specific as possible)?

---

12c Anything else?

---

13a. If you sign up for the free trial offer and have any questions, how can you go about getting answers? (Please be as specific as possible)

---

B13b. Assuming you were interested in online legal services for **Incorporation**, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do? (Please be as specific as possible)

B13c. Anything else?

---

14a. Which if any of the following options best describe what you are likely to do after having seen the Google Ad and Rocket Lawyer website? (Select one)

**ROTATE PUNCHES**

- 1 **BIZ:** Take the free trial (includes free processing)
- 2 Continue searching on other online legal service sites
- 3 Ask other people about the service
- 4 Decide not to buy an online legal service
- 5 **BIZ:** Pay for incorporation services (without free trial - \$99.95)
- 6 Other (specify) **(ANCHOR)**
- 7 I don't know **(ANCHOR)**

**DO NOT ASK Q14b-1/Q14b-2 IF PUNCH 7 'DK' AT Q14a**

14b-1. What made you decide to **[INSERT RESPONSE FROM Q14a]**? (Please be as specific as possible)

---

14b-2. Any other reasons?

---

**ASK Q14c IF DO NOT PUNCH 1 AT Q14a**

14c. Why did you not choose to take the free trial **[IF BIZ INSERT: which includes free Incorporation processing]**?

---

14d. Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing.

**RANDOMIZE 1-7**

1. Price
2. Advertisement
3. Customer reviews
4. Brand name
5. Recommendations from colleagues
6. Personal experience on the website
7. Opportunity to try the service for free
8. Other - please specify (optional) \_\_\_\_\_
9. Other - please specify (optional) \_\_\_\_\_

14e. Out of the list below, please rank the three **most important** factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

**ONLY ALLOW 3 ITEMS TO CONTAIN #S 1, 2 OR 3.**

1. Price	#
2. Advertisement	#
3. Customer reviews	#
4. Brand name	#
5. Recommendations from colleagues	#
6. Personal experience on the website	#
7. Opportunity to try the service for free	#
<b>8. [INSERT 'Other - please specify']</b>	<b>#</b>
<b>9. [INSERT 'Other - please specify']</b>	<b>#</b>

14f. Out of the remaining factors, please select any factors that are **not important** to you in deciding whether to use an online legal services company. (Select all that apply)

**SHOW ITEMS NOT SELECTED AT Q14e.**

**USE SAME ORDER AS IN Q14d**

1. Price
2. Advertisement
3. Customer reviews
4. Brand name
5. Recommendations from colleagues
6. Personal experience on the website
7. Opportunity to try the service for free
8. **[INSERT 'Other - please specify']**
9. **[INSERT 'Other - please specify']**

15a. Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

- 1 Yes
- 2 No
- 3 I don't know

**IF PUNCH 1 AT Q15a ASK Q15b-Q15d**

15b. Do you recall some of the businesses that offered these free trials? Please list them.

---

15c. Anything else?

---

15d. Did you ever decide to enroll in any free trial programs that were offered?

- 1 Yes
- 2 No
- 3 I don't know

**Thank you. Those are all the questions we have for you.**



**- ONLINE MAIN QUESTIONNAIRE - CONSUMER-**

**PICK 4 STIMULI TO BE ASKED BASED ON SELECTION AT S8, S9/S10b OR S11a/S11b. LIST OF STIMULI/SERVICES TO BE LEAST FILLED WITH QUOTAS OF 25 EACH (TEST AND CONTROL):**

- 2 Divorce**
- 3 Bill of Sale**
- 4 Lease Agreement**
- 5 Power of Attorney**

**INTRODUCTION:**

We are conducting a survey about online legal services for people interested in **[INSERT: online legal services]**.

We value your opinions and all of your answers will be held in the strictest confidence, so do not be afraid to answer each question honestly. Remember, there are no right or wrong answers.

Please do not search or ask others for help regarding any questions, we are only interested in your own opinions. If you don't know the answer, that is okay, please select "Don't Know" and move forward to the next question. Do not guess your answer.

- 1a. When you were interested in looking for online legal services, how did you go about finding what services are available? (Select all that apply.)

**RANDOMIZE. TALLY AND MONITOR ALL PUNCHES AT Q1a**

- 1 Used an internet search engine
- 2 Used a phone book
- 3 Asked friends/family
- 4 Asked colleagues
- 5 Spoke to a lawyer
- 6 Other (Specify) **(ANCHOR)**
- 7 **Didn't have to** --- I already knew of a name and just went directly to the site **(ANCHOR. EXCLUSIVE)**
- 8 I don't know **(ANCHOR. EXCLUSIVE)**

**IF PUNCH 1 AT Q1a ASK Q1b-1, OTHERWISE ASK Q1c.**

- 1b. Which search engine did you use to look for online legal services? (Select all that apply.)

**RANDOMIZE. TALLY AND MONITOR ALL PUNCHES AT Q1b**

- 1 Google
- 2 Yahoo
- 3 Bing
- 4 AOL
- 5 Ask
- 6 Other (Specify) **(ANCHOR)**

**IF NOT PUNCH 1 AT Q1a ASK Q1c.**

1c. Have you considered using a Google or other search engines to look for online legal services?  
(Select one.)

**TALLY AND MONITOR ALL PUNCHES AT Q1c**

- 1 Yes **(CONTINUE)**
- 2 No **(SKIP TO THE END OF THE SURVEY)**
- 3 I don't know **(SKIP TO THE END OF THE SURVEY)**

**EXECUTE EARLY EXIT:****IF DO NOT SELECT 'YES' AT Q1c**

Let's assume that you are considering **[INSERT: a [INSERT SERVICE/STIMULI]]** and are exploring using online legal service to help you do it. Also assume that as part of your search you used Google to search for "**[INSERT SERVICE/STIMULI ASKING ABOUT (E.G. DIVORCE)]**". Please review this search page as you normally would...

**NEW SCREEN****[INSERT GOOGLE SEARCH RESULTS IMAGE ALONE]****PN: INSERT TIMING DEVICE FOR THIS SCREEN****NEW SCREEN**

2. **[INSERT GOOGLE SEARCH RESULTS IMAGES TO SELECT, WITH OPTION TO VIEW IMAGE AGAIN]**

After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see? (Select all that apply.)

**[LIST THE COMPANIES BASED ON GOOGLE RESULTS. SELECT ALL THAT APPLY. TALLY ALL COMPANIES]**

**Please review this page and then scroll down and click the grey "Next" button to continue.**

**ASK Q3a-b FOR EACH RESPONSE FROM Q2**

3a. Why did you select this **[INSERT COMPANY FROM Q2]**? (Please be as specific as possible)

---

3b. Anything else?

---

**ASK Q4a IF ROCKET LAWYER IS NOT SELECTED AT Q2.**

4a. Which, if any, other companies that you did not originally select would you be interested in exploring further?

**(INSERT COMPANIES THAT DID NOT SELECT AT Q2 WITH 'NONE' AS LAST CHOICE)**

99 None **(ANCHOR)**

**IF ROCKET LAWYER IS NOT CHOSEN FOR Q2, BUT WAS CHOSEN FOR Q4a, INSERT 'initially' IN B4b. PRIORITIZE ROCKET LAWYER, AND ONE OTHER RANDOM COMPANY. INSERT RANDOM COMPANY IF ROCKET LAWYER WAS NOT SELECTED AT Q2 AND/OR Q4a.**

C4b. Please tell us why you did not [initially1] select [COMPANY 1]?

[INSERT 'GOOGLE AD' 1]

---

Now, please tell us why you did not [initially2] select [COMPANY 2]?

[INSERT 'GOOGLE AD' 2]

---

**ASK Q5c IF ROCKET LAWYER NOT SELECTED AT Q2 OR Q4a**

- 5c. Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?
- 1 Yes **(CONTINUE)**
  - 2 No **(SKIP TO END OF SURVEY)**
  - 3 I don't know **(SKIP TO END OF SURVEY)**

**TALLY THOSE WHO DO NOT SELECT RL AT Q2/Q4a**

**EXECUTE EARLY EXIT:  
IF DO NOT SELECT 'YES' AT Q5c**

**STIMULI QUESTION INTRO  
PN: INSERT TIMING DEVICE FOR THIS SECTION**

Let's assume that when you were going over the Google search results you clicked on the Rocket Lawyer web site as a potential provider of online legal services.

We are going to show you a number of screen images from their web site. Please review the content on these screen images the way you normally would if you were looking for online services and deciding if you want to use the services of this company.

There is no need to insert the requested information on each screen, just to review this as an illustrative example. Make sure you get all the information you need from each page and proceed to the next page.

**[INSERT CONSUMER STIMULI - TO BE ASKED BASED ON SELECTION AT S8, S9, S10b OR S11a/S11b AND LEAST FILL.]**

**AT THE BOTTOM OF EACH STIMULI PAGE ASK Q6a**

6a. Did you get the information you need from this page to help you make a decision? If not, please review the page again.

- 1 Yes, I have reviewed this page

C7. Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer? (Please be as specific as possible)

---

C8. Anything else?

---

C9. You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

- 1 Yes
- 2 No
- 3 I don't know

**IF PUNCH 1 AT Q9 ASK Q10-Q11b**

C10. What was their free trial offer? Please list all the details about this offer that you can recall.

---

C11a. How would you describe the free trial offer to a friend? (Please be as specific as possible)

---

C11b. Anything else?

---

**DO NOT ASK Q12a IF PUNCH 2 AT QC9**

12a. Do you recall if the free trial offer has a time limit?

- 1 Yes
- 2 No
- 3 I don't know

**IF PUNCH 1 AT Q12a ASK Q12b-c**

12b. What happens after the free trial period? (Please be as specific as possible)?

---

12c. Anything else?

---

13a. If you sign up for the free trial offer and have any questions, how can you go about getting answers? (Please be as specific as possible)

---

C13b. Assuming you were interested in online legal services for a **[INSERT SERVICE/STIMULI ASKING ABOUT (E.G. DIVORCE)] form**, now that you have gone through the Rocket Lawyer website, what are you likely to do? (Please be as specific as possible)

---

C13c. Anything else?

---

14a. Which if any of the following options best describe what you are likely to do after having seen the Rocket Lawyer website? (Select one)

**ROTATE PUNCHES**

- 1 **CONSUMER:** Take the free trial (includes access to all Rocket Lawyer forms)
- 2 Continue searching on other online legal service sites
- 3 Ask other people about the service
- 4 Decide not to buy an online legal service
- 5 **CONSUMER:** Buy the form (without the free trial)
- 6 **CONSUMER:** Enroll in a monthly plan (access to all forms and help from attorneys for \$17.95 per month, includes attorney review of forms after 90 days)
- 7 **CONSUMER:** Enroll in an annual plan (access to all forms and attorney services immediately for \$9.99 a month when prepaying for one year)
- 8 Other (specify) **(ANCHOR)**
- 9 I don't know **(ANCHOR)**

**DO NOT ASK Q14b-1/Q14b-2 IF PUNCH 9 'DK' AT Q14a**

14b-1. What made you decide to **[INSERT RESPONSE FROM Q14a]**? (Please be as specific as possible)

---

14b-2. Any other reasons?

---

**ASK Q14c IF DO NOT PUNCH 1 AT Q14a**

14c. Why did you not choose to take the free trial?

---

14d. Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing.

**RANDOMIZE 1-7**

1. Price
2. Advertisement
3. Customer reviews
4. Brand name
5. Recommendations from colleagues
6. Personal experience on the website
7. Opportunity to try the service for free
8. Other - please specify (optional) \_\_\_\_\_
9. Other - please specify (optional) \_\_\_\_\_

14e. Out of the list below, please rank the three **most important** factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

**ONLY ALLOW 3 ITEMS TO CONTAIN #S 1, 2 OR 3.**

10. Price	#
11. Advertisement	#
12. Customer reviews	#
13. Brand name	#
14. Recommendations from colleagues	#
15. Personal experience on the website	#
16. Opportunity to try the service for free	#
<b>17. [INSERT 'Other - please specify']</b>	<b>#</b>
<b>18. [INSERT 'Other - please specify']</b>	<b>#</b>

14f. Out of the remaining factors, please select any factors that are **not important** to you in deciding whether to use an online legal services company. (Select all that apply)

**SHOW ITEMS NOT SELECTED AT Q14e.**

**USE SAME ORDER AS IN Q14d**

1. Price
2. Advertisement
3. Customer reviews
4. Brand name
5. Recommendations from colleagues
6. Personal experience on the website
7. Opportunity to try the service for free
8. **[INSERT 'Other - please specify']**
9. **[INSERT 'Other - please specify']**

15a. Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

- 1 Yes
- 2 No
- 3 I don't know

**IF PUNCH 1 AT Q15a ASK Q15b-Q15d**

15b. Do you recall some of the businesses that offered these free trials? Please list them.

---

15c. Anything else?

---

15d. Did you ever decide to enroll in any free trial programs that were offered?

- 1 Yes
- 2 No
- 3 I don't know

**Thank you. Those are all the questions we have for you.**

*APPENDIX H*

*APPENDIX H*



## Appendix H

### Online Legal Study - Screening Results

	<u>Total Contacts</u>
	3,334
<b><u>Terminated</u></b>	
Industry (Marketing research firm or department; advertising agency; PR agency; a law firm or a company that deals with giving legal advice including online law services companies)	148
Survey participation past 3 months	32
Under 18/Preferred not to answer	4
Consent	9
Not qualified for an online legal service	1941
Over Quota	437
Early Exit at Q1c or Q5c	333
Disqualified by Quality Control	8
<b><u>Completed interviews</u></b>	<b><u>422</u></b>

*APPENDIX I*

*APPENDIX I*

**SURVEY 14-0603, CASE ID 1881**

**Image Set**

» **INCORPORATION TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Texas*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *Yes*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Spoke to a lawyer*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.incorporate.com*

**Q3a** Why did you select this company? www.incorporate.com

» *Had much information and first selection on Google*

**Q3b** Anything else? [www.incorporate.com](http://www.incorporate.com)

» *nope*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» [www.legalzoom.com](http://www.legalzoom.com)

» [www.bizfilings.com](http://www.bizfilings.com)

**Q4b** Please tell us why you did not << initially >> select [www.legalzoom.com](http://www.legalzoom.com)?

» *Well-known company that has been around for many years.*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *Rocketlawyer sounds hocky... does not sound like a professional organization.*

**QB5a** Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

» *No*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *Utilized \$90 fee for registration and filing. Can get additional information, certificates and seals for additional cost.*

**QB8** Anything else?

» *Nope*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *No*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *...only if you incorporate online*

**QB10b2** Do you know if this state fee applies...

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *Payment*

**Q12c** Anything else?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *online*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *Not sign up...*

**Q13c** Anything else?

» *Nope*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Pay for incorporation services (without free trial - \$99.95)*

**Q14b1** What made you decide to << insert >>?

» *Free trials usually have a catch.*

**Q14b2** Any other reasons?

» *nope*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *fear*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Recommendations from colleagues 3*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Amazon Prime*

**Q15c** Anything else?

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *I don't know*

**Image Set**

» *POWER OF ATTORNEY TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Tennessee*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *I don't know*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.lawdepot.com*

» *www.totallegal.com*

» *www.rocketlawyer.com*

» *www.uniformpowerofattorney.com*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *The comment "Are all these free forms legal?" - This statement prompts me to want to read this to see if I could get power of attorney forms online or if I am better off going to visit an attorney*

**Q3a** Why did you select this company? *www.lawdepot.com*

» *The words "Free" and "Get immediate results" made me want to select this company*

**Q3a** Why did you select this company? www.totallegal.com

» *The words "Prepare online and print" made me what to see more from this company*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *The words "print forms in 5 min" and Ask a lawyer a question" made me want to look more into this company*

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» *The words "fill in the blanks" makes it sound simple and "no hidden fees" made me want to know more*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It's not free.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *just a one week trial offer*

**QC11a** How would you describe the free trial offer to a friend?

» *it is just a free week then you would have to purchase memebership*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *purchase membership*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *not sure*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I may research other sites and see who had the best offer*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *It was not free*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *it was only for a week then you still have to but membership*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 1*

» *Recommendations from colleagues 3*

» *Personal experience on the website 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*



**SURVEY 14-0603, CASE ID 1893**

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **25-34**

**S5** Please indicate the state in which you reside.

» **California**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Landlord/tenant matters**

» **Estate planning**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Landlord/tenant matters**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.totallegal.com**

**Q3a** Why did you select this company? www.legalzoom.com

» *gives the most info with the search result*

**Q3b** Anything else? www.legalzoom.com

» *i have heard of legalzoom*

**Q3a** Why did you select this company? www.totallegal.com

» *caught my interest*

**Q3b** Anything else? www.totallegal.com

» *none*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.uniformpowerofattorney.com*

**Q4b** Please tell us why you did not << initially >> select www.lawdepot.com?

» *it looks like a sponsored link and i don't always trust those*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *also looks like a sponsored link*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *they didn't appear to be reliable*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *can't recall anything other than it was for a short period of time.*

**QC11a** How would you describe the free trial offer to a friend?

» *they offer a free trial for services but i'm not sure if all services are included*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *it expires and you must pay for services*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *FAQ online*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *sign up*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *if it really does have access to all forms, i would try the free trial first*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 1*

» *Personal experience on the website 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Recommendations from colleagues*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *netflix*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» *BILL OF SALE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Healthcare*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Connecticut*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Estate planning*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *Yes*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Bill of Sale*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.buyerpricer.com*

» *www.officeconsultants.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *free. topical*

**Q3a** Why did you select this company? www.buyerpricer.com

» *same as above*

**Q3a** Why did you select this company? www.officeconsultants.com

» *same as above*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *I would look at this one*

**Q4b** Please tell us why you did not << initially >> select www.jsbusinessproducts.btobsource.com?

» *not free*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *trial basis subscription*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *don't remember*

**QC11a** How would you describe the free trial offer to a friend?

» *fair*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *subscription*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *not sure*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *go to their website*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *free. choice at end*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Personal experience on the website 3*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *don't recall*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**SURVEY 14-0603, CASE ID 1905**

**Image Set**

» **LEASE AGREEMENT CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None, I haven't taken a market research survey in the past 3 months**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **35-44**

**S5** Please indicate the state in which you reside.

» **California**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Landlord/tenant matters**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Some Other type of legal service**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.biztree.com**

**Q3a** Why did you select this company? www.biztree.com

» **It is a template**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» **www.lawdepot.com**

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *That would've been my next choice.*

**Q4b** Please tell us why you did not << initially >> select [www.ezlandlorrdforms.com](http://www.ezlandlorrdforms.com)?

» *Too many choices.*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Free trial for a week is good. Easy online process. Ability to connect with a lawyer*

**QC8** Anything else?

» *Webpage seems like it would be easy to navigate and application process is hassle free.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Free trial for a week ....\$19.95 monthly thereafter.*

**QC11a** How would you describe the free trial offer to a friend?

» *Rocket lawyer is offering a free one week trial.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *19.95 monthly or there were other options to choose from depending on the amount of services needed.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Ask a lawyer*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Contact Rocket Lawyer*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Enroll in a monthly plan (access to all forms and help from attorneys for \$17.95 per month, includes attorney review of forms after 90 days)*

**Q14b1** What made you decide to << insert >>?

» *Reasonable price*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *The monthly fee would be more after the free trial*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*



**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews* 3

» *Recommendations from colleagues* 2

» *Opportunity to try the service for free* 1

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 1909**

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **New York**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Executive**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

» **Landlord/tenant matters**

» **Estate planning**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **5 - Definitely will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I am or would be the primary decision maker**

**S13a** Please tell us what kind of device you are taking this survey on.

» **iPad or Tablet**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.totallegal.com*

» *www.rocketlawyer.com*

» *www.uniformpowerofattorney.com*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *Have seen advertisements, top of list, word "states" used in info*

**Q3a** Why did you select this company? *www.totallegal.com*

» *Free and state appeared in ad*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *Free and download forms*

**Q3a** Why did you select this company? *www.uniformpowerofattorney.com*

» *Download and no hidden fees, state specific*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Interview format, giving me control over data and use. Can control all the elements and set limits. There is a subscription service offered. It is password protected.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *I don't remember because I do not do trial offers. It's either go out no go for me.*

**QC11a** How would you describe the free trial offer to a friend?

» *I would tell them that a trial was offered*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *I would contact the company via email*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would go through the process but I would check out the ratings and reviews.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Buy the form (without the free trial)*

**Q14b1** What made you decide to << insert >>?

» *I don't liked trials.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *I don't like trials*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Customer reviews 2*

» *Brand name 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Phone apps, ms word, investigative sites, ny times*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Massachusetts*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

» *Family law*

» *Landlord/tenant matters*

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Other specify: ("google")*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.uniformpowerofattorney.com*

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» *most credible URL*

**Q3b** Anything else? www.uniformpowerofattorney.com

» *google not making money from banner advert.*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.legalzoom.com?

» *banner advert*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *banner advert*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *not relevant to me*

**QC8** Anything else?

» *not relevant to me*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *dont remember - too many pages ago.*

**QC11a** How would you describe the free trial offer to a friend?

» *cant remember*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *123*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *123*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *I don't know*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *cant remeber the offer*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Customer reviews 3*

» *Brand name 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Recommendations from colleagues*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *I don't know*

**SURVEY 14-0603, CASE ID 1921**

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Michigan**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Executive**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Estate planning**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Family law**

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Asked friends/family**

» **Spoke to a lawyer**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.rocketlawyer.com**

**Q3a** Why did you select this company? www.legalzoom.com



» *Liked the comment about are all these forms legal.*

**Q3b** Anything else? [www.legalzoom.com](http://www.legalzoom.com)

» *Ability to print forms*

**Q3a** Why did you select this company? [www.rocketlawyer.com](http://www.rocketlawyer.com)

» *Ability to edit and print forms from on line*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Many questions can be answered from this site.*

**QC8** Anything else?

» *Free trial basis, monthly fee or annual fee*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *No obligation*

**QC11a** How would you describe the free trial offer to a friend?

» *Legal service for free! This is certainly worth a try*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *online*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Try it out*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *Good way to check it out first, then may a opt for a longer term plan*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *quality of website*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Recommendations from colleagues 3*

» *Personal experience on the website 2*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Customer reviews*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**SURVEY 14-0603, CASE ID 1922**

**Image Set**

» **LEASE AGREEMENT CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **California**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Landlord/tenant matters**

» **Estate planning**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **2 - Probably will not**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalcontracts.com**

» **www.rocketlawyer.com**

» **www.biztree.com**

» **www.totallegal.com**

**Q3a** Why did you select this company? www.legalcontracts.com

» *I noticed 'free' right away*

**Q3b** Anything else? www.legalcontracts.com

» *easy is good. fill in & print is a no-brainer. sounds quick. I like quick & easy (& free)*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *I noticed 'free' right away & "5 minutes" quick & easy is good*

**Q3b** Anything else? www.rocketlawyer.com

» *861 followers on google gives impression of some legitimacy & long-standing reputation*

**Q3a** Why did you select this company? www.biztree.com

» *easy is good. download was mentioned, so I can keep a copy on my own computer*

**Q3b** Anything else? www.biztree.com

» *download & print in minutes tells me it is easy. Fast & easy are an important aspect of what I end up selecting.*

**Q3a** Why did you select this company? www.totallegal.com

» *I noticed 'free' and 'simple' That's what I need*

**Q3b** Anything else? www.totallegal.com

» *I liked this but it wasn't my first choice because I'm looking for renting month-to-month, and have a sense that this is lease only. Might not work for my needs. So I probably would look at the others first & might not get to this one at all.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *I felt tricked. Even though the one-time trial period is free, I wouldn't feel comfortable giving my billing information at the end. I would have spent time completing the form and then I wouldn't give my billing information, and would have wasted my time.*

**QC8** Anything else?

» *I don't trust Rocket Lawyer.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *one week free, then \$19.95/month. Cancel if desired, no obligation*

**QC11a** How would you describe the free trial offer to a friend?

» *Some people would go for it. I would not. I don't give my credit card information online. I would be worried. I don't automatically trust an online company with sensitive information. I wouldn't 'sign up' and I wouldn't advise others to do it either*

**QC11b** Anything else?

» *I get really irritated with offers that are free, but require personal information after they hook you in by getting you to complete the whole document only to find they want your credit card information at the end. No thanks!!!*

**Q12a** Do you recall if the free trial offer has a time limit?

» **Yes**

**Q12c** What happens after the free trial period?

» *\$19.95/month*

**Q12c** Anything else?

» *OK to cancel, no obligation*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *I didn't notice contact info.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Go elsewhere to find a form that doesn't automatically sign me up for something I don't want.*

**Q13c** Anything else?

» *I will never give my credit card info so nonchalantly. Feeling really scammed.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Other specify: ("Buy a form at stationary store")*

**Q14b1** What made you decide to << insert >>?

» *I don't want to waste my time looking online, now that I see there will probably be a 'catch'*

**Q14b2** Any other reasons?

» *I would maybe look at one more site before going to plan B*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *I do not provide my information to unknown entities on the internet. The company lost my trust because they should have specified up front that I would have to provide personal information, including credit card info, and that a trial service was part of the equation*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Recommendations from colleagues 1*

» *Personal experience on the website 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Credit card companies*

**Q15c** Anything else?

» *Subscriptions e.g. magazines*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» **No**

**SURVEY 14-0603, CASE ID 1924**

**Image Set**

» **LEASE AGREEMENT CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Illinois**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

» **Estate planning**

» **Some Other type of legal service**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **Yes**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Landlord/tenant matters**

» **Estate planning**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I am or would be the primary decision maker**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Asked friends/family**

» *Asked colleagues*

» *Spoke to a lawyer*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Yahoo*

» *Bing*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.ezlandlorrdforms.com*

» *www.lawdepot.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *Nothing specific but the title came across to me as though it's not a company but a service.*

**Q3b** Anything else? *www.legalcontracts.com*

» *Nope*

**Q3a** Why did you select this company? *www.ezlandlorrdforms.com*

» *Again, this site looks like a place to get forms and not necessarily a company trying to sell something.*

**Q3b** Anything else? *www.ezlandlorrdforms.com*

» *Nothing*

**Q3a** Why did you select this company? *www.lawdepot.com*

» *The site looks like a place to get info about rental leases and sample contracts.*

**Q3b** Anything else? *www.lawdepot.com*

» *Nothing*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.rocketlawyer.com*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *It stated free lease agreement month, which is an opportunity that I would be interested in.*

**Q4b** Please tell us why you did not << initially >> select *www.biztree.com*?

» *Sounds like the Amazon of lease info.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Looked very complete, detailing the typical areas of concern with respect to renting a property. The lead paint page was interesting as well as the payment option and maintenance pages.*

**QC8** Anything else?

» *Nothing*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Don't recall the specifics.*

**QC11a** How would you describe the free trial offer to a friend?

» *A free trial is available so the process can be evaluated first before making a commitment.*

**QC11b** Anything else?

» *Nothing.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *I do not recall.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Go to the Rocket Lawyer website and start the process of gathering lease information. This step will be more involved than the review I did for this survey.*

**Q13c** Anything else?

» *Nothing.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *First, it's free.*

**Q14b2** Any other reasons?

» *They appear to be specialists in this type of legal activity.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 1*

» *Recommendations from colleagues 2*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» Yes

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Car maintenance products, but I don't recall the exact product.*

**Q15c** Anything else?

» *Nothing.*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» Yes



**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *65 or older*

**S5** Please indicate the state in which you reside.

» *New Jersey*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *I don't know*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *It looked like it would be simple & easy*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Easy & simple*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Too many to write down*

**QC11a** How would you describe the free trial offer to a friend?

» *Not sure*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *online*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *nothing*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *I don't know*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Don't need the services now*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Brand name 2*

» *Personal experience on the website 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Recommendations from colleagues*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Hair products*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **LEASE AGREEMENT CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **Food Brands or Products**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Colorado**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Landlord/tenant matters**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **2 - Probably will not**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalcontracts.com**

» **www.rocketlawyer.com**

» **www.ezlandlordforms.com**

» **www.totallegal.com**

» **www.lawdepot.com**

**Q3a** Why did you select this company? **www.legalcontracts.com**

» **it's free - asks questions to make it specific**

**Q3a** Why did you select this company? **www.rocketlawyer.com**

» *free, editable*

**Q3a** Why did you select this company? www.ezlandlordforms.com

» *free, state specific*

**Q3a** Why did you select this company? www.totallegal.com

» *free, state specific*

**Q3a** Why did you select this company? www.lawdepot.com

» *would check to see if its free*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *free to use for one week - then 19.95 a month for basic plan*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *one week free basic plan*

**QC11a** How would you describe the free trial offer to a friend?

» *free one week trial*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *charged 19.95 a month to credit card*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *don't know*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *would research other companies to find the best offer.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *i always search out all possibilities*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *don't want to have to enter credit card information*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 2*

» *Recommendations from colleagues 3*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 1936**

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *65 or older*

**S5** Please indicate the state in which you reside.

» *Tennessee*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Executive*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Estate planning*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *Yes*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *2 - Probably will not*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *know*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.rocketlawyer.com*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *heard of*

**Q4b** Please tell us why you did not << initially >> select www.uniformpowerofattorney.com?

» *don't know*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Nothing this survey is boring*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *I don't know*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *ask*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *End this survey*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *I don't know*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Always a catch*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 2*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 1942**

**Image Set**

» *POWER OF ATTORNEY TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Healthcare*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Michigan*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.lawdepot.com*

» *www.totallegal.com*

» *www.rocketlawyer.com*

» *www.uniformpowerofattorney.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *There really is no specific reason if these were search results, I would check out several*

**Q3a** Why did you select this company? www.lawdepot.com

» *There really is no specific reason if these were search results, I would check out several*

**Q3a** Why did you select this company? www.totallegal.com

» *There really is no specific reason if these were search results, I would check out several* EXHIBIT B -415-



**Q3a** Why did you select this company? www.rocketlawyer.com

» *There really is no specific reason if these were search results, I would check out several*

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» *There really is no specific reason if these were search results, I would check out several*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *TURbo Tax style walk through of POA provisions. Legal review - \$18/mo for duration of your choice vs., \$10/mo for 1 year prepaid. Free trial, but not sure if you get legal review with that.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *That I am not so sure about. I assume it was the document building tool, but not the legal review?*

**QC11a** How would you describe the free trial offer to a friend?

» *I wouldn't other than what I said in answer to prior question*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *don't know*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *consider them compared to other similar services*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *I've only seen one*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *there are other free trials, I would guess*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *look & feel*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Recommendations from colleagues 2*

» *look & feel 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *not soecifically*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» *DIVORCE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Personal Care*

» *Food Brands or Products*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Tennessee*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Owner/Proprietor*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Landlord/tenant matters*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *iPad or Tablet*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.uslegalforms.com*

**Q3a** Why did you select this company? *www.uslegalforms.com*

» *Research was my objective. Needed to educate myself with forms.*

**Q3b** Anything else? *www.uslegalforms.com*

» *To the point and using simple language in their web intro.*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *Not familiar*

**Q4b** Please tell us why you did not << initially >> select *www.com?pletcase.com*?

» *Needed more info.*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Simple, fast, informative*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *I don't know*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Website or phone no.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Website*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *I don't know*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Do not need services*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Face to face when handling personal matters*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Recommendations from colleagues 2*

» *Face to face when handling personal matters 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *No*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 1956**

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Massachusetts*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Executive*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *Yes*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *5 - Definitely will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.uniformpowerofattorney.com*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *the ad caught my attention*

**Q3a** Why did you select this company? *www.uniformpowerofattorney.com*

» *same- the ad caught my attention*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select *www.totallegal.com*?

» *don't like the name*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *don't like the name*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *interview screens to set up preferences for a durable power of attorney. Free one week trial, then various membership/payment options*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *one week free trial offer*

**QC11a** How would you describe the free trial offer to a friend?

» *too short*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *they will use the credit card info entered*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *online*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *might consider using them*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *process is easy*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *nothing else*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Recommendations from colleagues 1*

» *Personal experience on the website 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» *DIVORCE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *65 or older*

**S5** Please indicate the state in which you reside.

» *Michigan*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Asked colleagues*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.completecase.com*

» *www.uslegalforms.com*

**Q3a** Why did you select this company? www.completecase.com

» *like do it your self format*

**Q3a** Why did you select this company? www.uslegalforms.com

» *features a do it yourself format*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *does not connote quality only speed*

**Q4b** Please tell us why you did not << initially >> select www.divorcewriter.com?



» *sounds too automated*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *stressed membership*

**QC8** Anything else?

» *payment by credit card*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *still need to supply credit card to take advantage of free offer....this means it is not free to me.*

**QC11a** How would you describe the free trial offer to a friend?

» *free offer but you need to give them credit card*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *you get billed 19.95/month*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *go back to website*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *probably go to a divorce lawyer*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Decide not to buy an online legal service*

**Q14b1** What made you decide to << insert >>?

» *do not like provide credit card and personal information to the internet*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *did not like credit card requirement*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *quality of legal service endorsed by somebody*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Recommendations from colleagues 2*

» *quality of legal service endorsed by somebody 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Personal experience on the website*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *dish network*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**SURVEY 14-0603, CASE ID 1961**

**Image Set**

» **INCORPORATION CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Florida*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Executive*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *Yes*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Didn't have to --- I already knew of a name and just went directly to the site*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» [www.incorporate.com](http://www.incorporate.com)

» [www.legalzoom.com](http://www.legalzoom.com)

» [www.mycorporation.com](http://www.mycorporation.com)

**Q3a** Why did you select this company? [www.incorporate.com](http://www.incorporate.com)

» *They were first on the list and their name fits the bill of what I am looking for.*

**Q3b** Anything else? [www.incorporate.com](http://www.incorporate.com)

» *Plus their description spells it out pretty cleanly.*

**Q3a** Why did you select this company? [www.legalzoom.com](http://www.legalzoom.com)

» *I am familiar with their brand and name.*

**Q3b** Anything else? [www.legalzoom.com](http://www.legalzoom.com)

» *I have used them in the past with good results*

**Q3a** Why did you select this company? [www.mycorporation.com](http://www.mycorporation.com)

» *The initial price of incorporation seems pretty competitive*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *The description did not address my initial search for general information*

**Q4b** Please tell us why you did not << initially >> select [www.incforfree.com](http://www.incforfree.com)?

» *Not enough information to go off of!*

**QB5a** Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

» *No*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *It is basically a free trial for a period of time and all one pays is the applicable state fees which in this case (California) is \$90.*

**QB8** Anything else?

» *There are additional add-on fees depending on the level of expedition and assistance that one might require.*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *...to all businesses that you want to incorporate regardless of how you chose to file your incorporation papers*

**QB10b2** Do you know if this state fee applies...

» *...if you incorporate through any online legal services company*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» **Yes**

**Q12a** Do you recall if the free trial offer has a time limit?

» **Yes**

**Q12c** What happens after the free trial period?

» *You may cancel or be charged accordingly*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *live chat customer support via phone or web*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *take the steps outlined on rocketlawyer.com and proceed based on the information that is required*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes free processing)*

**Q14b1** What made you decide to << insert >>?

» *Because it addresses all of my needs and concerns with regards to taking the step towards incorporation*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 2*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Netflix, Amazon Prime*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» **Yes**

**SURVEY 14-0603, CASE ID 1964**

**Image Set**

» *INCORPORATION CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Personal Care*

» *Food Brands or Products*

» *Healthcare*

» *Technology*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *New Jersey*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed part-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I share or would share this responsibility with others*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *I have heard of Legal Zoom before. The description wasn't a sales pitch, it says "learn about...", which is what I want to start with*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *It says "free" - some of the other listed showed a fee. I would check out free first. Not saying I would go with "free", just that I would read what they had to say first*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *They still tried to sell me something (2 different times) \$90 to just incorporate They will get my tax id # for me for another fee. I can't go back in check, but I think one page said the LLC would cost me \$99 and then on another page it said \$90 (or my mind could be playing tricks on me)*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *I don't know*

**QB10b2** Do you know if this state fee applies...

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *credit card will be charged \$39.95/month if I accepted*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *no idea if that was mentioned I would assume you could call them*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *1) research to find out exactly what the fees are for my state 2) figure out how hard it was to do on my own*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Pay for incorporation services (without free trial - \$99.95)*

**Q14b1** What made you decide to << insert >>?

» *I just want to incorporate - nothing more. i know hat that means, tax implications, etc - why would I want to buy something more.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *No one told my why i would need it? Why is it necessary? If I have a big problem, I am not turning to an on-line legal service, I am going to sit down with a lawyer. Give me a good reason for the trial. The trial is just a headache I'll need to remember to cancel before they hit my credit card with the fee after the one week trial expires*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *just as good as a face-to-face lawyer*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Recommendations from colleagues 2*

» *just as good as a face-to-face lawyer 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Customer reviews*

» *Brand name*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *netflix*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*



**Image Set**

» **LEASE AGREEMENT TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None, I haven't taken a market research survey in the past 3 months**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **Pennsylvania**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Landlord/tenant matters**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Landlord/tenant matters**

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalcontracts.com**

» **www.rocketlawyer.com**

» **www.ezlandlordforms.com**

» **www.totallegal.com**

**Q3a** Why did you select this company? **www.legalcontracts.com**

» *Online contracts available for free*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *Online contracts available for free*

**Q3a** Why did you select this company? www.ezlandlorrdforms.com

» *state specific Online contracts available for free*

**Q3a** Why did you select this company? www.totallegal.com

» *state specific Online contracts available for free*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *One week free trial \$19.95 per month after. Any documents made during the trial are free.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *One week free trial. All documents created are free even if trial is cancelled.*

**QC11a** How would you describe the free trial offer to a friend?

» *One week free trial, all documents created are free even if trial is cancelled.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *\$19.95 per month autodebit.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *contact them*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I can do the free trial first to see what the actual lease looks like.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Other specify: ("check reviews")*

**Q14b1** What made you decide to << insert >>?

» *I always check reviews before I buy anything.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Not needed at this time*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 2*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *ezlegalforms*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 1992**

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None, I haven't taken a market research survey in the past 3 months**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Wisconsin**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.lawdepot.com**

» **www.totallegal.com**

» **www.rocketlawyer.com**

**Q3a** Why did you select this company? www.lawdepot.com

» **Free on line form**

**Q3b** Anything else? www.lawdepot.com

» **Immediate**

**Q3a** Why did you select this company? www.totallegal.com

» **Free - State specific**

**Q3b** Anything else? www.totallegal.com

» **Online and printable**

**Q3a** Why did you select this company? www.rocketlawyer.com

» *free - printable*

**Q3b** Anything else? www.rocketlawyer.com

» *quick - 5 minutes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It's not free unless you give them your credit card information*

**QC8** Anything else?

» *you have 10 days before they charge your credit card*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *You have 10 days to cancel out before they charge the credit card information you provided when you signed up. You have to sign up in order to get a printed copy.*

**QC11a** How would you describe the free trial offer to a friend?

» *Tricky*

**QC11b** Anything else?

» *The "free" trial is somewhat misleading.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *you are charged*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *call 800#*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I don't like giving out my credit card number if I do not intend actually joining*

**Q13c** Anything else?

» *This is misleading so I would not be interested.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *See if any other site provides without giving credit card information*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Don't want to give my credit card information with a possible charge to my account when I really don't want to join.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No credit card required*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Personal experience on the website 3*

» *Opportunity to try the service for free 2*

» *No credit card required 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Can't remember*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 1994**

**Image Set**

» *DIVORCE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Healthcare*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Self employed*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Family law*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *5 - Definitely will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *AOL*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.lawdepot.com*

» [www.completecase.com](http://www.completecase.com)

» [www.uslegalforms.com](http://www.uslegalforms.com)

**Q3a** Why did you select this company? [www.lawdepot.com](http://www.lawdepot.com)

» *Sounds like it might have the forms I would need*

**Q3b** Anything else? [www.lawdepot.com](http://www.lawdepot.com)

» *Like the name*

**Q3a** Why did you select this company? [www.completecase.com](http://www.completecase.com)

» *If I were looking to do it myself without hiring a lawyer, this would appeal*

**Q3b** Anything else? [www.completecase.com](http://www.completecase.com)

» *Sounds good*

**Q3a** Why did you select this company? [www.uslegalforms.com](http://www.uslegalforms.com)

» *If I were looking for an agreement, this would be my first choice.*

**Q3b** Anything else? [www.uslegalforms.com](http://www.uslegalforms.com)

» *Sounds like what I would need*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» [www.rocketlawyer.com](http://www.rocketlawyer.com)

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *The name sounds strange, rocketlawyer*

**Q4b** Please tell us why you did not << initially >> select [www.divorcewriter.com](http://www.divorcewriter.com)?

» *It's Massachusetts and I'm in CA*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Better than I would have imagined! It seems exceptionally thorough and easy to navigate and if I were in the market for a divorce, I wouldn't hesitate to use this website.*

**QC8** Anything else?

» *I thought the forms and look of the website pages were very appealing.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *I just know there was one. I also liked that you could pay monthly, good option.*

**QC11a** How would you describe the free trial offer to a friend?

» *Worth trying.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Contact them at any time*



**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Use them*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Enroll in an annual plan (access to all forms and attorney services immediately for \$9.99 a month when prepaying for one year)*

**Q14b1** What made you decide to << insert >>?

» *It seems fair and divorces take a long time.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Because I think the yearly is a better option*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 1*

» *Recommendations from colleagues 2*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Website design, credit monitoring, frequent flyer account monitoring, tax help*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Temporarily unemployed*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *heard good things about it*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.totallegal.com*

**Q4b** Please tell us why you did not << initially >> select www.totallegal.com?

» *sounds unprofessional*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *sounds unprofessional*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please return to the page again.

- » *Yes, I have reviewed this page (Page 1)*
- » *Yes, I have reviewed this page (Page 2)*
- » *Yes, I have reviewed this page (Page 3)*
- » *Yes, I have reviewed this page (Page 4)*
- » *Yes, I have reviewed this page (Page 5)*
- » *Yes, I have reviewed this page (Page 6)*
- » *Yes, I have reviewed this page (Page 7)*
- » *Yes, I have reviewed this page (Page 8)*
- » *Yes, I have reviewed this page (Page 9)*
- » *Yes, I have reviewed this page (Page 10)*
- » *Yes, I have reviewed this page (Page 11)*
- » *Yes, I have reviewed this page (Page 12)*
- » *Yes, I have reviewed this page (Page 13)*
- » *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

- » *fair*

**QC8** Anything else?

- » *easy to understand*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

- » *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

- » *dont remember*

**QC11a** How would you describe the free trial offer to a friend?

- » *dont remember*

**Q12a** Do you recall if the free trial offer has a time limit?

- » *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

- » *live chat*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

- » *research more companies*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

- » *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

- » *research all services to find one that suits me*

**Q14c** Why did you not choose to take the free trial<< insert >>?

- » *dont need services now*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

- » *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

- » *Price 2*

- » *Customer reviews 1*

- » *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

- » *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

- » *No*

**SURVEY 14-0603, CASE ID 2001**

**Image Set**

» **LEASE AGREEMENT TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Personal Care*

» *Food Brands or Products*

» *Healthcare*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Arizona*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Landlord/tenant matters*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *2 - Probably will not*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.ezlandlordforms.com*

» [www.lawdepot.com](http://www.lawdepot.com)

**Q3a** Why did you select this company? [www.ezlandlorrdforms.com](http://www.ezlandlorrdforms.com)

» *Gave me a little more info than just Free. I liked the state specific language*

**Q3a** Why did you select this company? [www.lawdepot.com](http://www.lawdepot.com)

» *It was more business like and formal. An important point when looking for legal help*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *the name was not appealing to me*

**Q4b** Please tell us why you did not << initially >> select [www.totallegal.com](http://www.totallegal.com)?

» *free as the selling point is not the most important to me and that is the lead text*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Nothing is ever "Free". I understand everyone is in business but I want to know how much it is going to cost before I get to the last screen. If I was just looking for one document, this is not the right application. If I ran a small business and needed documents on a regular basis it may be cost effective.*

**QC8** Anything else?

» *I missed what limitations there are on quantities of documents either per month or per year.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *one week, one free document, then transfers to monthly on the credit card you are required to input to get your document.*

**QC11a** How would you describe the free trial offer to a friend?

» *you get on week, then monthly fee. good for a small business*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *goes to monthly fee*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *get online answers, chat is available*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» depends on if this is a one time thing or not. I would not be happy to input pages of info, and then get to the money part at the end. I want to know what I am doing from page 1, otherwise I would be pretty unhappy and leave the site.

**Q13c** Anything else?

» be up front. If it is a worthy service, I will be happy to pay, but not when you make me input info and then tell me terms.

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» Continue searching on other online legal service sites

**Q14b1** What made you decide to << insert >>?

» not being up front about purchasing plans

**Q14c** Why did you not choose to take the free trial<< insert >>?

» I do not trust a site that requires a credit card to access. Invariably there will be a charge on my card whether I want it or not.

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» how does the company stand behind their product

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» Customer reviews 1

» Opportunity to try the service for free 2

» how does the company stand behind their product 3

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» Advertisement

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» Yes

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» I do not recall names

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» No

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Retired*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

**Q1b** Which search engine did you use to look for online legal services?

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *I've heard of it before*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *no particular reason - never heard of them.*

**Q4b** Please tell us why you did not << initially >> select www.uniformpowerofattorney.com?

» *no particular reason*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please return to the page again.

- » Yes, I have reviewed this page (Page 1)
- » Yes, I have reviewed this page (Page 2)
- » Yes, I have reviewed this page (Page 3)
- » Yes, I have reviewed this page (Page 4)
- » Yes, I have reviewed this page (Page 5)
- » Yes, I have reviewed this page (Page 6)
- » Yes, I have reviewed this page (Page 7)
- » Yes, I have reviewed this page (Page 8)
- » Yes, I have reviewed this page (Page 9)
- » Yes, I have reviewed this page (Page 10)
- » Yes, I have reviewed this page (Page 11)
- » Yes, I have reviewed this page (Page 12)
- » Yes, I have reviewed this page (Page 13)
- » Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

- » You get a one week trial offer with your document, then different pricing plans for monthly or the year.

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

- » Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

- » one week and get your document

**QC11a** How would you describe the free trial offer to a friend?

- » one document for free

**Q12a** Do you recall if the free trial offer has a time limit?

- » Yes

**Q12c** What happens after the free trial period?

- » you go to monthly or yearly and can do other documents.

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

- » there's a number to call

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

- » not sure

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

- » Take the free trial (includes access to all Rocket Lawyer forms)

**Q14b1** What made you decide to << insert >>?

- » to see what's available

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

- » No additional factors apply

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

- » Brand name 3

- » Recommendations from colleagues 2

- » Personal experience on the website 1

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

- » Price

- » Customer reviews

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

- » Yes

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.



» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 2013**

**Image Set**

» *DIVORCE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Oregon*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Family law*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» *Yes*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *Yes*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.3stepdivorce.com*

» *www.lawdepot.com*

» *www.divorcewriter.com*

**Q3a** Why did you select this company? *www.3stepdivorce.com*

» *3 easy steps, price was listed*

**Q3a** Why did you select this company? *www.lawdepot.com*

» *The company name caught my eye.*

**Q3a** Why did you select this company? *www.divorcewriter.com*

» *Price listed, as well as what it offers*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *No specific reason*

**Q4b** Please tell us why you did not << initially >> select *www.com?pletcase.com*?

» *No price listed, name did not catch my eye*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *One week free trial*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *One week*

**QC11a** How would you describe the free trial offer to a friend?

» *You get a free trial and then are billed unless you cancel*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *one week*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *There was a link*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would likely use it if I knew how much it would cost*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *Simple access to the form, easy to complete*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 3*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**SURVEY 14-0603, CASE ID 2014**

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Florida**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **Because it is at the top of the search page.**

**Q3b** Anything else? www.legalzoom.com

» **I have heard of legalzoom before.**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» **www.totallegal.com**

**Q4b** Please tell us why you did not << initially >> select www.lawdepot.com?

» **I might because it is also free.**

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» **Because it also says free.**

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» Yes

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» Yes, I have reviewed this page (Page 1)

» Yes, I have reviewed this page (Page 2)

» Yes, I have reviewed this page (Page 3)

» Yes, I have reviewed this page (Page 4)

» Yes, I have reviewed this page (Page 5)

» Yes, I have reviewed this page (Page 6)

» Yes, I have reviewed this page (Page 7)

» Yes, I have reviewed this page (Page 8)

» Yes, I have reviewed this page (Page 9)

» Yes, I have reviewed this page (Page 10)

» Yes, I have reviewed this page (Page 11)

» Yes, I have reviewed this page (Page 12)

» Yes, I have reviewed this page (Page 13)

» Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» The service is a free trial membership.

**QC8** Anything else?

» If you don't cancel the trial membership after seven days the service will continue uninterrupted but you will be charged 19.95 per month.

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» seven days of unlimited free service including free legal assistance and access to hundreds of legal documents.

**QC11a** How would you describe the free trial offer to a friend?

» You get free service for seven days. It includes access to other legal documents besides the POA document. It also said you get free legal assistance.

**QC11b** Anything else?

» I think it said you also get signature guarantees on documents.

**Q12a** Do you recall if the free trial offer has a time limit?

» Yes

**Q12c** What happens after the free trial period?

» Your service will continue uninterrupted for a fee.

**Q12c** Anything else?

» Your credit card is charged 19.95 month.

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» there is a chat function on the website where you can discuss questions with an agent.

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» If I needed the POA, I would go ahead and try it out for seven days so that I could get the document.

**Q13c** Anything else?

» If I didn't have any other pending legal issues I would probably cancel after the trial membership.

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» Take the free trial (includes access to all Rocket Lawyer forms)

**Q14b1** What made you decide to << insert >>?

» Because the POA would satisfy an immediate legal need.

**Q14b2** Any other reasons?

» It is free!

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *legal need*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 3*

» *legal need 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Personal experience on the website*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Businesses that offer printing. Businesses that sale cosmetics.*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 2016**

**Image Set**

» **LEASE AGREEMENT TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Virginia**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed part-time**

**S8a** Which of the following best describes your position with your company?

» **Intermediate level**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Landlord/tenant matters**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **Yes**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Landlord/tenant matters**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalcontracts.com**

» **www.ezlandlorrdforms.com**

**Q3a** Why did you select this company? www.legalcontracts.com

» **create online easy to use**

**Q3a** Why did you select this company? www.ezlandlorrdforms.com

» **try for free**



**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *If I searched other sites I would probably not look at all sites. I would find one and use it*

**Q4b** Please tell us why you did not << initially >> select www.totallegal.com?

» *If I searched other sites I would probably not look at all sites. I would find one and use*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It was free for one week and then became a monthly charge. There was also an annual offer.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Free for one week then became a monthly charge.*

**QC11a** How would you describe the free trial offer to a friend?

» *You get to produce your document and make a decision about how to proceed in the future*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *A monthly charge is then applied*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *You visit the website*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would want a specific charge for the one document I produced and needed and probably not want to pay an ongoing monthly charge. I probably would not have a need for other documents. Or I would come back to the site for future document on an a la carte basis. As needed.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Buy the form (without the free trial)*

**Q14b1** What made you decide to << insert >>?

» *It was what I needed and the interview process worked well for me to complete the form*

**Q14c** Why did you not choose to take the free trial << insert >>?

» *I did not want to be obligated to further charges. I just wanted to get a good legal document to work with. Willing to pay a fee for the document.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 3*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *health supplements*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 2024**

**Image Set**

» *DIVORCE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.lawdepot.com*

» *www.completecase.com*

» *www.uslegalforms.com*

**Q3a** Why did you select this company? www.lawdepot.com

» *wanted to review the agreement*

**Q3b** Anything else? www.lawdepot.com

» *no*

**Q3a** Why did you select this company? www.completecase.com

» *wanted to see the complete divorce package*

**Q3b** Anything else? www.completecase.com

» *no*

**Q3a** Why did you select this company? www.uslegalforms.com

» *wanted to review the forms*

**Q3b** Anything else? www.uslegalforms.com

» *no*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.rocketlawyer.com*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *to review the agreement*

**Q4b** Please tell us why you did not << initially >> select www.divorcewriter.com?

» *cost to see the agreement*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *This is a paid service (after 7 days).*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *free 7 day, read only docs. But you have to provide a credit card!*

**QC11a** How would you describe the free trial offer to a friend?

» *not so good*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *you get charged \$20*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *web site or call*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *go somewhere for free documents*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *looking for free documents*

**Q14c** Why did you not choose to take the free trial << insert >>?

» *don't want to give out my credit card information*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 3*

» *Recommendations from colleagues 2*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *not sure*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» *POWER OF ATTORNEY CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Personal Care*

» *Technology*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Indiana*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed part-time*

**S8a** Which of the following best describes your position with your company?

» *Intermediate level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Bing*

» *AOL*

» *Ask*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.lawdepot.com*

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *Free forms with the question as to whether they are legal forms.*

**Q3b** Anything else? www.legalzoom.com

» *there are followers on Google*

**Q3a** Why did you select this company? www.lawdepot.com

» *Free and with online forms and they are lawyer drafted.*

**Q3b** Anything else? www.lawdepot.com

» *Sounds reputable.*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *Simple directions listed. You can ask a lawyer a question.*

**Q3b** Anything else? www.rocketlawyer.com

» *Has followers on Google.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *The questions are simple and quick to fill out on the forms.*

**QC8** Anything else?

» *The pages, order and questions that a person has are thorough. I liked the ease as which you could travel to the next question.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *I don't know*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *you can speak to a lawyer.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *check it out further and compare it to other sights.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *To be able to study the forms better to see if it is as complete as it sounds.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Brand name 3*

» *Personal experience on the website 2*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*



**SURVEY 14-0603, CASE ID 2040**

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Texas*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Self employed*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

» *Some Other type of legal service*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Asked friends/family*

» *Asked colleagues*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.uniformpowerofattorney.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *Are All These Free Forms Legal--made me curious*

**Q3b** Anything else? www.legalzoom.com

» *Forms seem to be located all in one site*

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» *State Specific Forms*

**Q3b** Anything else? www.uniformpowerofattorney.com

» *to compare with the other site*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» [www.totallegal.com](http://www.totallegal.com)

**Q4b** Please tell us why you did not << initially >> select [www.totallegal.com](http://www.totallegal.com)?

» *I usually only select a couple of sites at a time for comparison. Then, if I need more info, I keep selecting one at a time.*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *didn't like the name*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It asks good questions. Has a free trial offer for only 1 week, then \$19.95/month kicks in.*

**QC8** Anything else?

» *it seems to be above board, in spite of the initial negative first impression based on the mane*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *1 week, then \$19.95*

**QC11a** How would you describe the free trial offer to a friend?

» *short*

**QC11b** Anything else?

» *no*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *19.95 kicks in*

**Q12c** Anything else?

» *I already answered this like 3 times*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *contact via phone, email*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *read reviews, investigate exactly what free trial includes, compare to other sites*

**Q13c** Anything else?

» *no*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *it's the first site I've visited, & I'd like to do comparisons, get recommendations*

**Q14b2** Any other reasons?

» *no*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *not ready to commit, need to do more research*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 3*

» *Recommendations from colleagues 1*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *LinkedIn, The Ladders*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **Healthcare**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **65 or older**

**S5** Please indicate the state in which you reside.

» **California**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Retired**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Estate planning**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Asked friends/family**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.lawdepot.com**

» **www.uniformpowerofattorney.com**

**Q3a** Why did you select this company? www.lawdepot.com

» **Because it offered online forms at no charge**

**Q3b** Anything else? www.lawdepot.com

» **no**

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» *Appears to be exactly what I was looking for*

**Q3b** Anything else? www.uniformpowerofattorney.com

» *no*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.totallegal.com?

» *no particular reason*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *gimmicky name . . . wouldn't trust it*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *various pricing plans*

**QC8** Anything else?

» *free trial membership*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *free membership for a week*

**QC11a** How would you describe the free trial offer to a friend?

» *Free membership on a trial basis*

**QC11b** Anything else?

» *no*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *not sure*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *online help*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *sign up*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *see if I like it before I join*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 2*

» *Personal experience on the website 3*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Ask.co,*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**SURVEY 14-0603, CASE ID 2055**

**Image Set**

» **INCORPORATION TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Healthcare*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Tennessee*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Intermediate level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

» *Some Other type of legal service*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I share or would share this responsibility with others*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» [www.incorporate.com](http://www.incorporate.com)

» [www.legalzoom.com](http://www.legalzoom.com)

» [www.rocketlawyer.com](http://www.rocketlawyer.com)

» [www.bizfilings.com](http://www.bizfilings.com)

» [www.incfree.com](http://www.incfree.com)

» [www.mycorporation.com](http://www.mycorporation.com)

**Q3a** Why did you select this company? [www.incorporate.com](http://www.incorporate.com)

» *These companies seem t have the information I needed and they were free*

**Q3a** Why did you select this company? [www.legalzoom.com](http://www.legalzoom.com)

» *This companies seem to have the information I needed and it was free*

**Q3a** Why did you select this company? [www.rocketlawyer.com](http://www.rocketlawyer.com)

» *This companies seem to have the information I needed and it was free*

**Q3b** Anything else? [www.rocketlawyer.com](http://www.rocketlawyer.com)

» *It had phone number that I could use.*

**Q3a** Why did you select this company? [www.bizfilings.com](http://www.bizfilings.com)

» *This companies seem to have the information I needed and it was free*

**Q3a** Why did you select this company? [www.incfree.com](http://www.incfree.com)

» *This companies seem to have the information I needed and it was free*

**Q3b** Anything else? [www.incfree.com](http://www.incfree.com)

» *the company had a phone number that I could use.*

**Q3a** Why did you select this company? [www.mycorporation.com](http://www.mycorporation.com)

» *It stated that the form were on line*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *It took me step by step to set up the company. it asked for name, description, if it was a LLC, wanted me to name additional members. Wanted my credit card information a*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *I don't know*



**QB10b2** Do you know if this state fee applies...

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *There was a phone number to call if you have any questions*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *Check to see how reliable this company is. What their BB score*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Ask other people about the service*

**Q14b1** What made you decide to << insert >>?

» *To see their impression of the company and what type of service they give to their customers*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *They still want the credit card information*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 2*

» *Recommendations from colleagues 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Books, Weight loss products, people search, stores. and credit score companies*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» *DIVORCE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Iowa*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

» *Family law*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I share or would share this responsibility with others*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.uslegalforms.com*

**Q3a** Why did you select this company? www.uslegalforms.com

» *it offers the forms necessary to move forward*

**Q3b** Anything else? www.uslegalforms.com

» *appears simple*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.lawdepot.com*

» [www.completecase.com](http://www.completecase.com)

**Q4b** Please tell us why you did not << initially >> select [www.lawdepot.com](http://www.lawdepot.com)?

» *The word free usually doesn't mean free*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *rocket lawyer is hard to take seriously. I also don't trust free.*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» Yes

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» Yes, I have reviewed this page (Page 1)

» Yes, I have reviewed this page (Page 2)

» Yes, I have reviewed this page (Page 3)

» Yes, I have reviewed this page (Page 4)

» Yes, I have reviewed this page (Page 5)

» Yes, I have reviewed this page (Page 6)

» Yes, I have reviewed this page (Page 7)

» Yes, I have reviewed this page (Page 8)

» Yes, I have reviewed this page (Page 9)

» Yes, I have reviewed this page (Page 10)

» Yes, I have reviewed this page (Page 11)

» Yes, I have reviewed this page (Page 12)

» Yes, I have reviewed this page (Page 13)

» Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Allows you to try the service with minimal cost or no cost.*

**QC8** Anything else?

» *Takes you step by step through the creation of the document and asks very easy questions. Offers additional support from a live person as needed.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *You can use the read only version or sign up for a 1 week free trial*

**QC11a** How would you describe the free trial offer to a friend?

» *1 week free trial but then you have to sign up for a monthly subscription*

**Q12a** Do you recall if the free trial offer has a time limit?

» Yes

**Q12c** What happens after the free trial period?

» *must end it or else you are hooked into the monthly subscription*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *there is online chat support or you can call.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *probably sign up for the monthly subscription until I was completely through the divorce process*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *it would give an opportunity to test out the site without a long term commitment*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price* 3

» *Customer reviews* 2

» *Personal experience on the website* 1

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» Yes

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Netflix gym memberships apps for phones*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» Yes

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **Food Brands or Products**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **35-44**

**S5** Please indicate the state in which you reside.

» **Minnesota**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Intermediate level**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

» **Bing**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.lawdepot.com**

» **www.totallegal.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **Has phone # incase I wanted to talk to someone.**

**Q3b** Anything else? www.legalzoom.com

» **Listed different kinds of forms available.**

**Q3a** Why did you select this company? www.lawdepot.com

» **States what it is for.**

**Q3b** Anything else? www.lawdepot.com

» *Immediate results listed as option.*

**Q3a** Why did you select this company? www.totallegal.com

» *notes that they have for every state*

**Q3b** Anything else? www.totallegal.com

» *able to print from online*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *no specific reason*

**Q4b** Please tell us why you did not << initially >> select www.uniformpowerofattorney.com?

» *would never remember that address, too long if I needed to go into again*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Easy to follow information/step by step process.*

**QC8** Anything else?

» *multiple options for their services (one time/one month, yearly)*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *1 free document with trial*

**QC11a** How would you describe the free trial offer to a friend?

» *Something to look into if they were needed a one time thing*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *one line or phone # to call*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Use that website to get mine. Probably use the free trial offer.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *Currently not needing other forms.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 3*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

» *Recommendations from colleagues*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**SURVEY 14-0603, CASE ID 2068**

**Image Set**

» **LEASE AGREEMENT TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **New York**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Landlord/tenant matters**

» **Estate planning**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Asked friends/family**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.rocketlawyer.com**



» [www.ezlandlorrdforms.com](http://www.ezlandlorrdforms.com)

» [www.totallegal.com](http://www.totallegal.com)

**Q3a** Why did you select this company? [www.rocketlawyer.com](http://www.rocketlawyer.com)

» *The description implied that I could find exactly what I wanted and print it quickly for review later. Also, provided a lawyer to answer any questions that might arise.*

**Q3b** Anything else? [www.rocketlawyer.com](http://www.rocketlawyer.com)

» *Free is always a good word.*

**Q3a** Why did you select this company? [www.ezlandlorrdforms.com](http://www.ezlandlorrdforms.com)

» *I liked the fact that the site claimed state-specific lease forms, which implied I could be assured that what I retrieved would apply to my location.*

**Q3b** Anything else? [www.ezlandlorrdforms.com](http://www.ezlandlorrdforms.com)

» *Again, free is good.*

**Q3a** Why did you select this company? [www.totallegal.com](http://www.totallegal.com)

» *Specifically stated that you could edit the form on line and then print your version. Also, again spoke about different forms for different states.*

**Q3b** Anything else? [www.totallegal.com](http://www.totallegal.com)

» *Free is king on the web.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *I did NOT like the fact that I didn't see the caveats about subscribing and what is included until AFTER I had spent considerable time working on my document.*

**QC8** Anything else?

» *At least I was able to take the free limited time subscription to save and print the document I worked on.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *1 month for free with the ability to upgrade to a membership.*

**QC11a** How would you describe the free trial offer to a friend?

» *Free demo, but need to pay for complete membership and ability to use for more than one month.*

**QC11b** Anything else?

» *You want to take all you can with you when you leave the site, so it doesn't disappear after a month, if you decide to not continue with the company.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *You get to become a full member (at a price) if you decided to to.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Not sure. I believe you can contact the company during the period to see what the membership provides.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Print the form to a file/document so I can use it multiple times.*

**Q13c** Anything else?

» *Basically in order to get a "free" lease agreement will require more work than originally thought. I would have to print whatever they let me print to a file and massage that document to create a template to be used multiple times.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *Because I would assume that the other sites are similar and I don;t want to go through all that again to merely get a lease form. I wouldn't pay for my "free" form.*

**Q14b2** Any other reasons?

» *I would get what I came for and then cancel the subscription at the earliest possible time afterwards.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *more upfront description of what is being offered for free.*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 3*

» *Personal experience on the website 1*

» *more upfront description of what is being offered for free. 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Angie's List*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» **INCORPORATION TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **New Jersey**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Some other level**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

» **Family law**

» **Estate planning**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I share or would share this responsibility with others**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» *Asked friends/family*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.incorporate.com*

» *www.legalzoom.com*

» *www.bizfilings.com*

**Q3a** Why did you select this company? *www.incorporate.com*

» *The company name is descriptive of what I would seek*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *recognize the name from commercials and article*

**Q3a** Why did you select this company? *www.bizfilings.com*

» *recognize the name from advertising*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.delawareinc.com*

» *www.mycorporation.com*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *The name*

**Q4b** Please tell us why you did not << initially >> select *www.directincorporation.com*?

» *Not interested in incorporating in CA*

**QB5a** Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

» *Yes*

**QB5b** Thinking back to the Google search page, please tell us what you recall about the Rocket Lawyer ad.

» *the name*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *Incorporate your business in CA*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *I don't know*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» ...to all businesses that you want to incorporate regardless of how you chose to file your incorporation papers

**QB10b2** Do you know if this state fee applies...

» ...if you incorporate through any online legal services company

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» Yes

**Q12a** Do you recall if the free trial offer has a time limit?

» No

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» i dont know

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» sign up through the web site

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» Take the free trial (includes free processing)

**Q14b1** What made you decide to << insert >>?

» try before you by theory

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» No additional factors apply

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» Price 3

» Customer reviews 2

» Recommendations from colleagues 1

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» Advertisement

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» Yes

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» do not recall

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» No

**SURVEY 14-0603, CASE ID 2079**

**Image Set**

» *DIVORCE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *65 or older*

**S5** Please indicate the state in which you reside.

» *New Jersey*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

» *Family law*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *Yes*

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.uslegalforms.com*

**Q3a** Why did you select this company? *www.uslegalforms.com*

» *expecting templates*

**Q3b** Anything else? *www.uslegalforms.com*

» *no*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.rocketlawyer.com*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *"free"*

**Q4b** Please tell us why you did not << initially >> select *www.divorcewriter.com*?

» *more interested in "free"*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *no risk offer*

**QC8** Anything else?

» *can cancel anytime*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *free trial for 1 week*

**QC11a** How would you describe the free trial offer to a friend?

» *free trial offer*

**QC11b** Anything else?

» *for one week*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *fee will be charged*

**Q12c** Anything else?

» *two options*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *can do online chat*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *register for free trial*

**Q13c** Anything else?

» *no*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *to compare*

**Q14b2** Any other reasons?

» *no*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *perhaps after looking at other free trials from other sites*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *price*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 1*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*



**SURVEY 14-0603, CASE ID 2081**

**Image Set**

» **INCORPORATION CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **Pennsylvania**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Some Other type of legal service**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I share or would share this responsibility with others**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.mycorporation.com**

**Q3a** Why did you select this company? www.legalzoom.com

» *Recognize the name from advertising*

**Q3a** Why did you select this company? www.mycorporation.com

» *Ad looks targeted to my needs*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.incorporate.com*

» *www.incfiler.com*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *No in CA, and "rocket" lawyer... sounds fast but not professional*

**Q4b** Please tell us why you did not << initially >> select www.delawareinc.com?

» *Not in DE*

**QB5a** Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

» *No*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *Free means you still need to pay fees... mostly to state. Offer full service and it is easy.*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *I don't know*

**QB10b2** Do you know if this state fee applies...

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *Did not see... assume it is a subscription that continues unless you cancel it.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Didn't remember that detail*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *Consider options that are easy online like this one.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *I don't know*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Hesitated at what may continue to be charged for without knowing if I will need or use it.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Endorsement from reputable entities.*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 3*

» *Recommendations from colleagues 1*

» *Endorsement from reputable entities. 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *news services, Angies list, Linked In premium*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **LEASE AGREEMENT CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Florida*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Self employed*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Family law*

» *Bill of Sale*

» *Landlord/tenant matters*

» *Some Other type of legal service*

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Some Other type of legal service*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Spoke to a lawyer*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Bing*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.ezlandlorrdforms.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *The name has a direct connection to what I need. the URL looks legitimate. Ability to print.*

**Q3a** Why did you select this company? *www.ezlandlorrdforms.com*

» *Title makes me think I will easily find what I am looking for. URL looks legitimate. State specific forms mentioned.*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *I don't want a lawyer in the name. I assume the forms have been reviewed by a lawyer but if I wanted a lawyer to do the forms I would go to one in person. The name "rocketlawyer" is child-like and loses credibility with me.*

**Q4b** Please tell us why you did not << initially >> select *www.biztree.com*?

» *sounds too "cheesy" I want a name that sounds more legitimate but not so generic.*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It walks you through building a contract. Pricing is based on the amount of time you use the service. A one-year prepaid contract is cheaper than the free offer.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *2 weeks free then \$19.95 per month after.*

**QC11a** How would you describe the free trial offer to a friend?

» *2 weeks free then a high price. Not worth the free offer. You probably need more than 2 weeks so you should use the 17.95 per month offer.*

**QC11b** Anything else?

» *It seems like a "uh-ha, gotcha, thought it was free but is \$20" offer. Not cool.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *charged \$19.95*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *don't remember.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *buy the \$17.95 offer as I have just one rental house. If I had more, I might purchase the one year plan*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Enroll in an annual plan (access to all forms and attorney services immediately for \$9.99 a month when prepaying for one year)*

**Q14b1** What made you decide to << insert >>?

» *cheaper. Better services. Better value (services:cost ratio)*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *I won't remember to cancel in 2 weeks. Why pay \$20 when I can pay \$10?*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Ease of use*

» *Legally correct and enforceable language in the documents*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Ease of use 1*

» *Legally correct and enforceable language in the documents 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *CVS Tide*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» ***DIVORCE TEST***

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» ***None of the above***

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» ***None of the above***

**S3** Please record your gender below.

» ***Male***

**S4** Which of the following categories includes your age?

» ***45-54***

**S5** Please indicate the state in which you reside.

» ***California***

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» ***I Agree***

**S7** Which of the following best describes your employment status?

» ***Employed full-time***

**S8a** Which of the following best describes your position with your company?

» ***Upper Management***

**S8b** Do you have any aspirations or plans to start your own company/business?

» ***No***

**S9** Over the past few years, have you looked on the internet for online legal services?

» ***Yes***

**S10a** What specific legal services have you looked for online?

» ***Family law***

» ***Landlord/tenant matters***

» ***Estate planning***

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» ***No***

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» ***No***

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» ***No***

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» ***2 - Probably will not***

**S13a** Please tell us what kind of device you are taking this survey on.

» ***Computer or Laptop***

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» ***Used an internet search engine***

**Q1b** Which search engine did you use to look for online legal services?

» ***Google***

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» ***www.lawdepot.com***

» [www.completecase.com](http://www.completecase.com)

» [www.uslegalforms.com](http://www.uslegalforms.com)

**Q3a** Why did you select this company? [www.lawdepot.com](http://www.lawdepot.com)

» *Free is always good - I can look into what they have to offer more before I decide.*

**Q3b** Anything else? [www.lawdepot.com](http://www.lawdepot.com)

» *I usually don't select the paid advertisement options - this was a search result only.*

**Q3a** Why did you select this company? [www.completecase.com](http://www.completecase.com)

» *This one seems to go further - full divorce*

**Q3a** Why did you select this company? [www.uslegalforms.com](http://www.uslegalforms.com)

» *Might be useful. At the very least I'd be interested in what forms they have available.*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select [www.3stepdivorce.com](http://www.3stepdivorce.com)?

» *Paid advertisement*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *Paid advertisement - plus gimmicky name.*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It says FREE upfront but when you get to the end you're faced with paying to really get anything done. I feel that this method of sucking people in and then holding them hostage is WRONG.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *It was free to fill in the data and look at it "Read Only" for a very limited time but if you really wanted something you'd have to sign up. I think you were required to sign up for the "Free" offer that switched to a monthly signup unless you actively stopped it.*

**QC11a** How would you describe the free trial offer to a friend?

» *Not worth it.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *You start getting charged a monthly fee.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *There was a chat option. Didn't notice other options.*



**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Move on.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *Looking for something that "felt" right. I wasn't comfortable with the approach taken at this website.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *I felt like there were too many catches and it was pretty short.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Brand name 3*

» *Recommendations from colleagues 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *I don't recall the offers*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» *BILL OF SALE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *65 or older*

**S5** Please indicate the state in which you reside.

» *Kansas*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Retired*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Bill of Sale*

» *Landlord/tenant matters*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.jsbusinessproducts.btobsource.com*

**Q3a** Why did you select this company? www.jsbusinessproducts.btobsource.com

» *not free*

**Q3b** Anything else? www.jsbusinessproducts.btobsource.com

» *others said auto*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.officeconsultants.com*

**Q4b** Please tell us why you did not << initially >> select www.legalcontracts.com?

» *can't remember*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *can't remember*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *you have to give credit card*

**QC8** Anything else?

» *seems generic enough; would have to seem final product to judge suitability*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *not free; required credit card*

**QC11a** How would you describe the free trial offer to a friend?

» *come on*

**QC11b** Anything else?

» *how naive to they think people are?*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *charge credit card*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *don't recall; it wasn't prominent*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *avoid online legal services*

**Q13c** Anything else?

» *go to library for forms*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Decide not to buy an online legal service*

**Q14b1** What made you decide to << insert >>?

» *shady outfit; probably all are*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *requires credit card*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *fake ad for free trial*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews* 2

» *Personal experience on the website* 3

» *Opportunity to try the service for free* 1

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15c** Anything else?

» *most are come-ons and not really free. require action to cancel service*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**SURVEY 14-0603, CASE ID 2127**

**Image Set**

» **LEASE AGREEMENT TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None, I haven't taken a market research survey in the past 3 months**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **North Dakota**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Landlord/tenant matters**

» **Estate planning**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **Yes**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Some Other type of legal service**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Used a phone book**

» **Asked friends/family**

» **Asked colleagues**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

» **Bing**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.biztree.com*

» *www.lawdepot.com*

**Q3a** Why did you select this company? *www.biztree.com*

» *I've heard of them before and I wouldn't trust a free form as much.*

**Q3b** Anything else? *www.biztree.com*

» *No.*

**Q3a** Why did you select this company? *www.lawdepot.com*

» *Heard of them before*

**Q3b** Anything else? *www.lawdepot.com*

» *No*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *Free. do not trust as much*

**Q4b** Please tell us why you did not << initially >> select *www.totallegal.com*?

» *Free*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *free, monthly or annually*

**QC8** Anything else?

» *9.99 monthly if annually or free for 7 days*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *one week*

**QC11a** How would you describe the free trial offer to a friend?

» *one week free trial to legal forms*

**QC11b** Anything else?

» *na*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers? **EXHIBIT B -501-**

» *website or call*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *read for more info*

**Q13c** Anything else?

» *na*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *free, just need to follow through not to orer if I don't like it*

**Q14b2** Any other reasons?

» *no*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 3*

» *Brand name 2*

» *Recommendations from colleagues 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15c** Anything else?

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Healthcare*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Ohio*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *I don't know*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.lawdepot.com*

» *www.uniformpowerofattorney.com*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *I knew it by name and had seen the TV ads*

**Q3a** Why did you select this company? *www.lawdepot.com*

» *It appeared to simply deal just with the forms. It seemed direct*

**Q3a** Why did you select this company? *www.uniformpowerofattorney.com*

» *The words "Immediate download" and "just fill in the blanks", "State specific" It also seemed very direct and simple*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?



» *None*

**Q4b** Please tell us why you did not << initially >> select www.totallegal.com?

» *I should have. I didn't see some of the text. It also sounds simple and most importantly, FREE*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *Not sure*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *They offer you a free trial offer and then monthly rates. There other screens ask & answer questions so you can complete your form*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *I'm sorry, I can't remember it all but I thought it was one week free trial period*

**QC11a** How would you describe the free trial offer to a friend?

» *Free trial offer (one week?) that allows you access to creating documents and answers questions regarding same*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *You can move to a monthly payment plan which I believe had an offer of \$17.99 a month*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *You're allowed access to their site and can ask online questions to their attorneys*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would use the free trial period and create the document. I believe the document is free, as well*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *It would allow me to create the POA that I would need at no cost and with legal assistance*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Range of services and products*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 3*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**SURVEY 14-0603, CASE ID 2131**

**Image Set**

» *BILL OF SALE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Personal Care*

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Massachusetts*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

» *Bill of Sale*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Asked colleagues*

» *Spoke to a lawyer*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *Seemed focused enough to meet my needs.*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *eSign capability.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *The step-by-step is critical, especially for a non-lawyer. The fact that the form is configurable by jurisdiction is great. I also liked the option to preview.*

**QC8** Anything else?

» *Trial membership is a good offering. Was not sure if there was a way to opt out of future correspondence (i.e. sales emails).*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Trial account. Unsure of commitment after trail period.*

**QC11a** How would you describe the free trial offer to a friend?

» *Access to forms without long-term commitment.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Website and phone number.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Review site for other Legal form options available.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *Forms seemed easy to use and configurable. Overall UI was good and easy to use.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Quality of examples*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 1*

» *Opportunity to try the service for free 2*

» *Quality of examples 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Many. Music subscription. Job search websites.*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**SURVEY 14-0603, CASE ID 2143**

**Image Set**

» **LEASE AGREEMENT TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Minnesota**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Self employed**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Landlord/tenant matters**

» **Some Other type of legal service**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

» **Some Other type of legal service**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Asked friends/family**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalcontracts.com**

» **www.rocketlawyer.com**

» **www.ezlandlorryforms.com**

**Q3a** Why did you select this company? www.legalcontracts.com

» **Their listing was free**

**Q3b** Anything else? www.legalcontracts.com

» *Seemed quick*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *Free and quick*

**Q3b** Anything else? www.rocketlawyer.com

» *Have followers*

**Q3a** Why did you select this company? www.ezlandlorrdforms.com

» *Again would be free and easy to do and quick*

**Q3b** Anything else? www.ezlandlorrdforms.com

» *Comprehensive*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *The free trial is for a week then you will have to pay for it. They will review contracts after a 90 day commitment.*

**QC8** Anything else?

» *There are two price breaks one for \$9.99 and one for 417.99*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *It was for one week then it would require a monthly commitment.*

**QC11a** How would you describe the free trial offer to a friend?

» *Easy to sign up. Very precise questions and detailed help to answer them. Try it out and see what you think for 7 days, but then there would be a charge. it is not that expensive.*

**QC11b** Anything else?

» *Service is reasonable after the trial period.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *You have a choice of two different options.*

**Q12c** Anything else?

» *One is \$9.99 and one is \$17.99*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Toll free number*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would be interested as it initially is free so I can try it out and the site is self explanatory.*

**Q13c** Anything else?

» *It is a well thought out site with much detail.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *It lets me try the service out without giving them money to begin with.*

**Q14b2** Any other reasons?

» *I liked the site as it was very detailed.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Set up of site*

» *Ease of using the site*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 2*

» *Recommendations from colleagues 1*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*



**Image Set**

» *DIVORCE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Asked friends/family*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.lawdepot.com*

» *www.completecase.com*

**Q3a** Why did you select this company? www.lawdepot.com

» *It didn't seem like a paid add*

**Q3a** Why did you select this company? www.completecase.com

» *It didn't seem like a paid add*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.3stepdivorce.com?

» *it seemed to be a paid listing*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *it seemed to be a paid listing*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» Yes

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» Yes, I have reviewed this page (Page 1)

» Yes, I have reviewed this page (Page 2)

» Yes, I have reviewed this page (Page 3)

» Yes, I have reviewed this page (Page 4)

» Yes, I have reviewed this page (Page 5)

» Yes, I have reviewed this page (Page 6)

» Yes, I have reviewed this page (Page 7)

» Yes, I have reviewed this page (Page 8)

» Yes, I have reviewed this page (Page 9)

» Yes, I have reviewed this page (Page 10)

» Yes, I have reviewed this page (Page 11)

» Yes, I have reviewed this page (Page 12)

» Yes, I have reviewed this page (Page 13)

» Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *They off a wide variety of legal filings*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *a week of service for free*

**QC11a** How would you describe the free trial offer to a friend?

» *a week free of offering*

**Q12a** Do you recall if the free trial offer has a time limit?

» Yes

**Q12c** What happens after the free trial period?

» *you are required to sign up for a package*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *you can contact via website*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *file*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Ask other people about the service*

**Q14b1** What made you decide to << insert >>?

» *to see how there experience was*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *you have to put in a credit card*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 2*

» *Recommendations from colleagues 1*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **Media company such as radio, newspaper, TV, etc.**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **North Carolina**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Asked colleagues**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

» **Ask**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.uniformpowerofattorney.com**

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» **Like the idea of download**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» **www.legalzoom.com**

**Q4b** Please tell us why you did not << initially >> select www.lawdepot.com?

» **uncomfortable with anything advertising "free" prominently**

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» **The name did not interest me**

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» **Yes**

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» **Yes, I have reviewed this page (Page 1)**

» **Yes, I have reviewed this page (Page 2)**

» **Yes, I have reviewed this page (Page 3)**

» **Yes, I have reviewed this page (Page 4)**

» **Yes, I have reviewed this page (Page 5)**

» **Yes, I have reviewed this page (Page 6)**

» **Yes, I have reviewed this page (Page 7)**

» **Yes, I have reviewed this page (Page 8)**

» **Yes, I have reviewed this page (Page 9)**

» **Yes, I have reviewed this page (Page 10)**

» **Yes, I have reviewed this page (Page 11)**

» **Yes, I have reviewed this page (Page 12)**

» **Yes, I have reviewed this page (Page 13)**

» **Yes, I have reviewed this page (Page 14)**

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» **very easy to read and walk through**

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» **Yes**

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» **do not remember**

**QC11a** How would you describe the free trial offer to a friend?

» **do not know**

**Q12a** Do you recall if the free trial offer has a time limit?

» **No**

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» **there was a contact number listed**

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» **I would give it a try**

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» **Take the free trial (includes access to all Rocket Lawyer forms)**

**Q14b1** What made you decide to << insert >>?

» **not sure**

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» **No additional factors apply**

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» **Customer reviews 2**

» **Recommendations from colleagues 1**

» **Personal experience on the website 3**

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» **Price**

» **Brand name**

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *ancestry.com amazon prime*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» Yes

**SURVEY 14-0603, CASE ID 2151**

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Virginia**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Executive**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Asked friends/family**

**Q1b** Which search engine did you use to look for online legal services?

» **Bing**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **recognition**

**Q3b** Anything else? www.legalzoom.com

» **good history**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» **www.totallegal.com**

**Q4b** Please tell us why you did not << initially >> select www.totallegal.com?

» **did not catch my interest**

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *did not catch my interest*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» **Yes**

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *very simple. Easy to understand*

**QC8** Anything else?

» *Very affordable*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» **Yes**

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *The document was free*

**QC11a** How would you describe the free trial offer to a friend?

» *yes*

**QC11b** Anything else?

» *must do more research*

**Q12a** Do you recall if the free trial offer has a time limit?

» **Yes**

**Q12c** What happens after the free trial period?

» *one month*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *call*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *look into site*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Ask other people about the service*

**Q14b1** What made you decide to << insert >>?

» *still researching*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *need to better understand before i accept anything for free*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.



» *Price 1*

» *Customer reviews 2*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Technology*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Texas*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *I don't know*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *It was the first one and it looks like a legitimate website*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.lawdepot.com*

» *www.totallegal.com*

**Q4b** Please tell us why you did not << initially >> select *www.lawdepot.com*?

» *I usually don't get good results from google when selecting the 2nd or 3rd results*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *I usually don't get good results from google when selecting the 2nd or 3rd results*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website? **EXHIBIT B -521-**

» Yes

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» Yes, I have reviewed this page (Page 1)

» Yes, I have reviewed this page (Page 2)

» Yes, I have reviewed this page (Page 3)

» Yes, I have reviewed this page (Page 4)

» Yes, I have reviewed this page (Page 5)

» Yes, I have reviewed this page (Page 6)

» Yes, I have reviewed this page (Page 7)

» Yes, I have reviewed this page (Page 8)

» Yes, I have reviewed this page (Page 9)

» Yes, I have reviewed this page (Page 10)

» Yes, I have reviewed this page (Page 11)

» Yes, I have reviewed this page (Page 12)

» Yes, I have reviewed this page (Page 13)

» Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» Offering free POA documents in read only version or offering to have them printed for a fee or paid membership.

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» Free POA document

**QC11a** How would you describe the free trial offer to a friend?

» Website allowed me to create a POA but then offered a membership for other legal services.

**Q12a** Do you recall if the free trial offer has a time limit?

» I don't know

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» can't remember

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» The website seems pretty easy to navigate and would more than likely use them in the future for other simple legal services.

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» Take the free trial (includes access to all Rocket Lawyer forms)

**Q14b1** What made you decide to << insert >>?

» Able to access all forms

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» No additional factors apply

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» Price 3

» Personal experience on the website 2

» Opportunity to try the service for free 1

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» Brand name

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» No

**SURVEY 14-0603, CASE ID 2158**

**Image Set**

» *DIVORCE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Nebraska*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Family law*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» *Yes*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.lawdepot.com*

» *www.completecase.com*

» *www.uslegalforms.com*

**Q3a** Why did you select this company? *www.lawdepot.com*

» *It sound like what I was looking for and low cost*

**Q3b** Anything else? *www.lawdepot.com*

» *no*

**Q3a** Why did you select this company? *www.completecase.com*

» *Sounds like I could do everything myself and avoid attorney fees*

**Q3a** Why did you select this company? *www.uslegalforms.com*

» *Looks like it give various types of divore agreements so I could choose.*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.divorcewriter.com*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *Didn't seem to ahve as much info as the others*

**Q4b** Please tell us why you did not << initially >> select *www.divorcewriter.com*?

» *I was only asked to pick 3 & this was 4th. Looks like you can do no fault for \$149.*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Sounds like they are available to help & you can reach them easily. Web site was easy to work with*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Access to their documetns and help if you needed it.*

**QC11a** How would you describe the free trial offer to a friend?

» *Easy to use and helpful and no cost to try*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *You can call or e-mail with specific questions*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Try to use it to see if it is all it is promised to be, especially since it is a free trial*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *I t gives you aceses to forms you might need and if it doesn't work , no cost*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Recommendations from colleagues 1*

» *Personal experience on the website 3*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **35-44**

**S5** Please indicate the state in which you reside.

» **Hawaii**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Intermediate level**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **my friend used them**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» **www.lawdepot.com**

**Q4b** Please tell us why you did not << initially >> select www.lawdepot.com?

» **not use**

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» **rocket**

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» **Yes**

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *free trial one week*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *one week*

**QC11a** How would you describe the free trial offer to a friend?

» *good*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *pay*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *chat room*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *yes*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *try it*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Personal experience on the website 2*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*



**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *zoom*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 2161**

**Image Set**

» *DIVORCE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Florida*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Intermediate level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Used a phone book*

**Q1b** Which search engine did you use to look for online legal services?

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.rocketlawyer.com*

» *www.completecase.com*

» *www.divorcewriter.com*

» *www.uslegalforms.com*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *Free*

**Q3b** Anything else? *www.rocketlawyer.com*

» *865 followers*

**Q3a** Why did you select this company? *www.completecase.com*

» *Do It Yourself*

**Q3b** Anything else? www.completecase.com

» *Featured on CNN...*

**Q3a** Why did you select this company? www.divorcewriter.com

» *\$149*

**Q3b** Anything else? www.divorcewriter.com

» *100% Guarantee*

**Q3a** Why did you select this company? www.uslegalforms.com

» *The title*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Chat available, Free Trial Membership and Payment Options*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Free trial offer when you use their services*

**QC11a** How would you describe the free trial offer to a friend?

» *Maybe*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Call toll free*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *call or chat*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *The ease displayed on the website*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Customer reviews 3*

» *Personal experience on the website 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Recommendations from colleagues*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *nothing*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 2163**

**Image Set**

» **LEASE AGREEMENT CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Healthcare*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Michigan*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed part-time*

**S8a** Which of the following best describes your position with your company?

» *Intermediate level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Landlord/tenant matters*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.rocketlawyer.com*

» [www.ezlandlorrdforms.com](http://www.ezlandlorrdforms.com)

» [www.totallegal.com](http://www.totallegal.com)

» [www.lawdepot.com](http://www.lawdepot.com)

**Q3a** Why did you select this company? [www.legalcontracts.com](http://www.legalcontracts.com)

» *It would give me basic information regarding rental agreements.*

**Q3b** Anything else? [www.legalcontracts.com](http://www.legalcontracts.com)

» *Foundation for future research.*

**Q3a** Why did you select this company? [www.rocketlawyer.com](http://www.rocketlawyer.com)

» *It would give me basic information regarding lease agreements.*

**Q3b** Anything else? [www.rocketlawyer.com](http://www.rocketlawyer.com)

» *Foundation for future research.*

**Q3a** Why did you select this company? [www.ezlandlorrdforms.com](http://www.ezlandlorrdforms.com)

» *Format and structure of lease agreements.*

**Q3b** Anything else? [www.ezlandlorrdforms.com](http://www.ezlandlorrdforms.com)

» *Foundation for future research.*

**Q3a** Why did you select this company? [www.totallegal.com](http://www.totallegal.com)

» *Available lease agreement documents.*

**Q3b** Anything else? [www.totallegal.com](http://www.totallegal.com)

» *Foundation for future research.*

**Q3a** Why did you select this company? [www.lawdepot.com](http://www.lawdepot.com)

» *Information regarding rental agreements in different states.*

**Q3b** Anything else? [www.lawdepot.com](http://www.lawdepot.com)

» *Foundation for future research.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It is a comprehensive site on the subject of lease agreements.*

**QC8** Anything else?

» *The site looked like it would be easy to navigate.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *It give a specific time period, it outlined the services included in the trial period, and also gave detailed pricing options.*

**QC11a** How would you describe the free trial offer to a friend?

» *You may want to check out this site to assist you in gathering information before making a leasing decision.*

**QC11b** Anything else?

» *The site can give you valuable information.*

**Q12a** Do you recall if the free trial offer has a time limit?

» **Yes**

**Q12c** What happens after the free trial period?

» *You can let the company know that you are no longer interested.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Via chat with customer service representatives.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Refer back to the site when I need further information before signing a lease.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Ask other people about the service*

**Q14b1** What made you decide to << insert >>?

» *Researching other options is an important part when making an important decision.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *I am still looking at other options before I make a decision.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Timing*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Recommendations from colleagues 3*

» *Timing 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Personal experience on the website*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Employment agency*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» **No**

**Image Set**

» *DIVORCE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Alabama*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Executive*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.lawdepot.com*

» *www.uslegalforms.com*

**Q3a** Why did you select this company? www.lawdepot.com

» *Web Address indicated that it was a resource and not an individual lawyer*

**Q3b** Anything else? www.lawdepot.com

» *It's a web address that I believe has value (and hence would have some substance)*

**Q3a** Why did you select this company? www.uslegalforms.com

» *Specific web address suggests I will get access to tools and not a sales pitch*

**Q3b** Anything else? www.uslegalforms.com



» *Specific focus on Divorce in search and content*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.completecase.com*

**Q4b** Please tell us why you did not << initially >> select www.3stepdivorce.com?

» *It appears to be specific to State of Massachusetts so it would not help me in Alabama*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *Name sounds to cheesy*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It's a 3 tier program with a 1 month free trial subject to an annual subscription with various monthly fees. document processing is included in basic program with legal advice services being provided at higher tiers.*

**QC8** Anything else?

» *There is appearance of a national service and local legal representation is offered as part of the fee*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *1 month free trial for basic document preparation with the registration and credit card number at time of sign up*

**QC11a** How would you describe the free trial offer to a friend?

» *Like most others it's basic service for the 1st month with the expectation that you will continue the service billing on your credit card*

**QC11b** Anything else?

» *May be useful if you need advise and don't have a lawyer or don't want to pay higher fees for a local/personal service provider*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *automatic billing kicks in on the credit card*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Live chat is available via the website*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *use the 1 month free trial to produce the papers*

**Q13c** Anything else?

» *If I need additional help, sign up for one of the service levels to access additional documents or advise*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *website was straight forward and document creation looked very simple*

**Q14b2** Any other reasons?

» *If I got in trouble there were reasonably priced options to take for help*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 2*

» *Recommendations from colleagues 1*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Credit Report Services, Music Sharing Services, Web Search (People Search)*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Michigan*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Intermediate level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Spoke to a lawyer*

» *Other specify: ("email from org. on special for legalzoom")*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.lawdepot.com*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *Heard of them and sound credible.*

**Q3a** Why did you select this company? *www.lawdepot.com*

» *Free Power of Attorney*

**Q3b** Anything else? *www.lawdepot.com*

» *Online Forms*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.totallegal.com*

» *www.rocketlawyer.com*

**Q4b** Please tell us why you did not << initially >> select [www.totallegal.com](http://www.totallegal.com)?

» *Did not look down that far*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *does not sound as professional*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *it appears simple to fill out, but not free.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Not sure*

**QC11a** How would you describe the free trial offer to a friend?

» *provides forms, but have to purchase signed, legal document.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *believe you could talk to a legal representative*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would still go through LegalZoom as I get a discount.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *Worth looking at the finished document.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Authentic Legal Binding Document*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Recommendations from colleagues 2*

» *Opportunity to try the service for free 1*

» *Authentic Legal Binding Document 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **LEASE AGREEMENT CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **Healthcare**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **New Jersey**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Landlord/tenant matters**

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Asked friends/family**

» **Asked colleagues**

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» **Yes**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.rocketlawyer.com**

**Q3a** Why did you select this company? www.rocketlawyer.com

» **ease of use**

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» **Yes, I have reviewed this page (Page 1)**

» **Yes, I have reviewed this page (Page 2)**

» **Yes, I have reviewed this page (Page 3)**

» **Yes, I have reviewed this page (Page 4)**

» **Yes, I have reviewed this page (Page 5)**

» Yes, I have reviewed this page (Page 6)

» Yes, I have reviewed this page (Page 7)

» Yes, I have reviewed this page (Page 8)

» Yes, I have reviewed this page (Page 9)

» Yes, I have reviewed this page (Page 10)

» Yes, I have reviewed this page (Page 11)

» Yes, I have reviewed this page (Page 12)

» Yes, I have reviewed this page (Page 13)

» Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *the lease would be filled out professionally and effectively*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *the free trial was use of their forms*

**QC11a** How would you describe the free trial offer to a friend?

» *I would describe it as the company would have all the free forms they needed*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *you could either email or call*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would be filling it out with my personal information, information of the tenant and printing*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Buy the form (without the free trial)*

**Q14b1** What made you decide to << insert >>?

» *I was able to fill out the form myself without needing any additional forms in the near future*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *the free trial was not needed*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Personal experience on the website 3*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *I don't know*

**Image Set**

» **INCORPORATION TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Student*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *Yes*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *2 - Probably will not*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.directincorporation.com*

» *www.calfilings.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *I'm familiar with it and I have used them before.*

**Q3b** Anything else? www.legalzoom.com

» *no*



**Q3a** Why did you select this company? www.directincorporation.com

» *I live in California so this sounds relevant to my needs.*

**Q3b** Anything else? www.directincorporation.com

» *no*

**Q3a** Why did you select this company? www.calfilings.com

» *Again this seems relevant based on the name of the business and that I am in CA.*

**Q3b** Anything else? www.calfilings.com

» *no*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *I didn't like the sound of the name rocketlawyer. Sounds like they would just do a rush job & maybe not quality.*

**Q4b** Please tell us why you did not << initially >> select www.smallbiz.com?

» *I don't know it just didn't appeal to me.*

**QB5a** Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

» *No*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *It seems really easy.*

**QB8** Anything else?

» *no*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *I don't know*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *I don't know*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *there is an 800 number and email access.*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *I would try it out.*

**Q13c** Anything else?

» *no*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Pay for incorporation services (without free trial - \$99.95)*

**Q14b1** What made you decide to << insert >>?

» *I liked how easy the website is to use.*

**Q14b2** Any other reasons?

» *no*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Because if I liked the trial I would wind up purchasing the product and since I liked the ease of the website I was pretty sure that I liked it.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 2*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Netflix*

**Q15c** Anything else?

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» *DIVORCE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Estate planning*

» *Some Other type of legal service*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.completecase.com*

» *www.uslegalforms.com*

**Q3a** Why did you select this company? www.completecase.com

» *Appears to be a location where I can learn more and get an idea of what is involved.*

**Q3b** Anything else? www.completecase.com

» *Do it yourself is enticing*

**Q3a** Why did you select this company? www.uslegalforms.com

» *looks like a location where I can find out more about specific requirements in my stage and learn more about what forms are required.*

**Q3b** Anything else? [www.uslegalforms.com](http://www.uslegalforms.com)

» *Immediate access to forms.*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *[www.rocketlawyer.com](http://www.rocketlawyer.com)*

**Q4b** Please tell us why you did not << initially >> select [www.lawdepot.com](http://www.lawdepot.com)?

» *Potential to ask questions.*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *Free agreements for all states so I can learn more about what is required.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *The basic free trial is available for only a short time, after which, if I don't cancel, I will be billed. Several levels of service are available. The format for preparing a document by answering simple questions seems very easy, and there is chat assistance and a toll free number available.*

**QC8** Anything else?

» *Format is simple and easy to understand.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Preparation of a single document and one week of service.*

**QC11a** How would you describe the free trial offer to a friend?

» *Limited in use, but convenient, and will provide a good amount of experience to judge the system.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *You get charged \$19.95 on a recurring basis.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Chat, or toll free phone*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Download the form and decide if it is comprehensive enough to proceed. Maybe have a friend who is acquainted with legal matters review the form.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *I have only one example of what is available. I want to find out if there are other sites that offer more or better services.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Asks for a credit card and then relies on my cancellation of services to prevent billings later.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *security of data*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Personal experience on the website 1*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Amazon Prime*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**SURVEY 14-0603, CASE ID 2193**

**Image Set**

» *INCORPORATION TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Owner/Proprietor*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Family law*

» *Landlord/tenant matters*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *Yes*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

» *Bill of Sale*

» *Landlord/tenant matters*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Other specify: ("Start Page")*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.incfyle.com*

» *www.smallbiz.com*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *Have heard advertisements, name recognition.*

**Q3b** Anything else? *www.legalzoom.com*

» *Teaching aspect, not telling you.*

**Q3a** Why did you select this company? *www.incfyle.com*

» *Price upfront.*

**Q3a** Why did you select this company? *www.smallbiz.com*

» *State specific.*

**Q3b** Anything else? *www.smallbiz.com*

» *Price upfront*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.rocketlawyer.com*

» *www.calfilings.com*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *Previous experience, not impressed.*

**Q4b** Please tell us why you did not << initially >> select *www.mycorporation.com*?

» *State specific but higher price.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *pretty straight forward*

**QB8** Anything else?

» *easier to use than expected*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *No*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» **Yes**

**Q12a** Do you recall if the free trial offer has a time limit?

» **Yes**

**Q12c** What happens after the free trial period?

» ***billed \$39 unless canceled***

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» ***ask***

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» ***try the service***

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» ***Take the free trial (includes free processing)***

**Q14b1** What made you decide to << insert >>?

» ***easy and fast***

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» ***No additional factors apply***

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» ***Price 1***

» ***Recommendations from colleagues 2***

» ***Opportunity to try the service for free 3***

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» ***Brand name***

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» ***Music down loader, Legal Zoom***

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» **Yes**



**SURVEY 14-0603, CASE ID 2196**

**Image Set**

» **INCORPORATION TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **California**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Executive**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

» **Bill of Sale**

» **Landlord/tenant matters**

» **Estate planning**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **Yes**

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» **Yes**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **5 - Definitely will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Incorporation/forming a business or organization**

» **Family law**

» **Bill of Sale**

» **Landlord/tenant matters**

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.incorporate.com*

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? *www.incorporate.com*

» *I guess based on their address!*

**Q3b** Anything else? *www.incorporate.com*

» *it just looked based on the address that it would be the place*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *because it mentioned free*

**Q3b** Anything else? *www.rocketlawyer.com*

» *FREE!!!!*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.incfiler.com*

» *www.smallbiz.com*

**Q4b** Please tell us why you did not << initially >> select *www.legalzoom.com*?

» *I have heard of legal zoom and assumed they would ust be trying to sell me their products. I recall once going to their website and they were expensive.*

**Q4b** Please tell us why you did not << initially >> select *www.delawareinc.com*?

» *mentioned price upfront*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *no*

**QB8** Anything else?

» *but I like the ad of the 2 women*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *I don't know*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *...only if you incorporate online*

**QB10b2** Do you know if this state fee applies...

» *...if you incorporate through any online legal services company*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *they have a toll free number*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *fill out information*

**Q13c** Anything else?

» *on the web it begins*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *just to double check*

**Q14b2** Any other reasons?

» *to make sure this is the best way to proceed*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *honestly not sure*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Advertisement 3*

» *Customer reviews 1*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**SURVEY 14-0603, CASE ID 2201**

**Image Set**

» ***DIVORCE CONTROL***

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» ***None of the above***

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» ***None of the above***

**S3** Please record your gender below.

» ***Male***

**S4** Which of the following categories includes your age?

» ***45-54***

**S5** Please indicate the state in which you reside.

» ***Texas***

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» ***I Agree***

**S7** Which of the following best describes your employment status?

» ***Employed full-time***

**S8a** Which of the following best describes your position with your company?

» ***Middle Management***

**S8b** Do you have any aspirations or plans to start your own company/business?

» ***No***

**S9** Over the past few years, have you looked on the internet for online legal services?

» ***No***

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» ***3 - May or may not***

**S11b** Specifically, what types of online legal services will you be looking for?

» ***Family law***

**S13a** Please tell us what kind of device you are taking this survey on.

» ***Computer or Laptop***

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» ***Used an internet search engine***

» ***Asked friends/family***

**Q1b** Which search engine did you use to look for online legal services?

» ***Google***

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» ***www.rocketlawyer.com***

» ***www.completecase.com***

» ***www.uslegalforms.com***

**Q3a** Why did you select this company? www.rocketlawyer.com

» ***because of the wording it uses: all states, legally binding***

**Q3b** Anything else? www.rocketlawyer.com

» ***looks to have a link to ask a lawyer a question***

**Q3a** Why did you select this company? www.completecase.com

» ***because it mentions CNN, UDA Today and NBC***

**Q3a** Why did you select this company? www.uslegalforms.com

» *"state specific forms"*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *fair offer*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *get your document and one week free*

**QC11a** How would you describe the free trial offer to a friend?

» *check out rocketlawyer*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *your charged to continue membership*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *ask a lawyer*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *discuss with a lawyer*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *its free*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 1*

» *Brand name 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *I don't know*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **Media company such as radio, newspaper, TV, etc.**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Iowa**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Executive**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Estate planning**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **Yes**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **more informatio**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» **www.rocketlawyer.com**

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *went to the top of page selection*

**Q4b** Please tell us why you did not << initially >> select [www.uniformpowerofattorney.com](http://www.uniformpowerofattorney.com)?

» *use of the word free*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *easy to use and convenient*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *offer for a limited time*

**QC11a** How would you describe the free trial offer to a friend?

» *worth looking at*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *you can cancel or automatically renew*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *online*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *nothing at this time*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *it is free*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Advertisement 3*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Customer reviews*



**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» *POWER OF ATTORNEY TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

» *Technology*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Virginia*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Retired*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.lawdepot.com*

» *www.uniformpowerofattorney.com*

**Q3a** Why did you select this company? *www.lawdepot.com*

» *I feel like the right forms will be there, I can ask questions, and lawyer(s) created the site.*

**Q3a** Why did you select this company? *www.uniformpowerofattorney.com*

» *I know it is important to use the correct form for your state. It looks like I will know the cost upfront (no hidden fees).*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.rocketlawyer.com*

**Q4b** Please tell us why you did not << initially >> select *www.legalzoom.com*?

» *The name is too cutesy to be taken seriously particularly if the forms are also free.*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *I am not sure I will get the best information totally free.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *I really like the interview format that appears to walk me through all of steps in creating the POA. I also think the free trial is great, although many people would probably get all of their documents in one week, and then bail, so how does this company make any profit?*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *One week free trial. It also looked like they had a read only option where you can't print the docs you have created, although I don't know how useful that would be.*

**QC11a** How would you describe the free trial offer to a friend?

» *You can get one week of free legal documents on this website.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *I am not sure. I guess it would convert to a paid subscription. Since you already have entered your credit card info, it is probably automatic unless you specifically request to cancel. I don't remember how you do that.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Oops! I didn't look at that information at all, but there is probably some contact info on the website somewhere...*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I might consider trying it.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *As long as I did it at a time when I knew I would be able to search through the docs fully, I would want to take advantage of a free service.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 3*

» *Brand name 1*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Recommendations from colleagues*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Usually they are magazines, and I occasionally succumb to the offer.*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» **Yes**

**Image Set**

» *BILL OF SALE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

» *Healthcare*

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Pennsylvania*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Bill of Sale*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.buyerpricer.com*

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *Free*

**Q3a** Why did you select this company? *www.buyerpricer.com*

» *Free*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *Free*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It is not free, asking for credit card.*

**QC8** Anything else?

» *I do not wish for rocket lawyer to have access to my facebook account*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *I don't know*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *I am sure my credit card will be charged*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Not sure*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Look elsewhere*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *Need to compare and contrast to ensure I have the best bill of sale possible*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *I was asked for a credit card; that is not free*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 3*

» *Recommendations from colleagues 2*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *none come to mind*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **65 or older**

**S5** Please indicate the state in which you reside.

» **New Jersey**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Retired**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **Most specific to my needs**

**Q3b** Anything else? www.legalzoom.com

» **no**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» **www.lawdepot.com**

**Q4b** Please tell us why you did not << initially >> select www.lawdepot.com?

» **not specific**

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» **don't like the name**

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» **Yes**



**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Power of Attorney*

**QC8** Anything else?

» *other legal matters*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *I don't know*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *checking website*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Do not think so*

**Q13c** Anything else?

» *would check other websites*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *comparison*

**Q14b2** Any other reasons?

» *none*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *want to compare*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 2*

» *Recommendations from colleagues 1*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**SURVEY 14-0603, CASE ID 2221**

**Image Set**

» *BILL OF SALE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Wisconsin*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

» *Bill of Sale*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *Yes*

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» *Yes*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *Yes*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Bill of Sale*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.jsbusinessproducts.btobsource.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *seemed easy to use*

**Q3a** Why did you select this company? *www.jsbusinessproducts.btobsource.com*

» *not sure*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select *www.buyerpricer.com*?

» *free is usually not free*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *free is usually not really free*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Free trial, multiple payment choices*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *free offer*

**QC11a** How would you describe the free trial offer to a friend?

» *no long term commitment*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *read fine print or dig deeper into website*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *try trial*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *seemed easy*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 2*

» *Recommendations from colleagues 3*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *I don't know*

**SURVEY 14-0603, CASE ID 2230**

**Image Set**

» **LEASE AGREEMENT CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **Personal Care**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **65 or older**

**S5** Please indicate the state in which you reside.

» **Michigan**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Retired**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Landlord/tenant matters**

» **Estate planning**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.rocketlawyer.com**

» **www.ezlandlordforms.com**

» **www.totallegal.com**

**Q3a** Why did you select this company? **www.rocketlawyer.com**

» *like to diy when possible to save money*

**Q3a** Why did you select this company? www.ezlandlorrdforms.com

» *Sometimes agreements have to much jargon. Check to see if Ez would be appropriate.*

**Q3a** Why did you select this company? www.totallegal.com

» *Again free access to information*

**Q3b** Anything else? www.totallegal.com

» *compare information*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It's not really free at all.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *free 30 day review*

**QC11a** How would you describe the free trial offer to a friend?

» *usual tag on fees*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *you pay*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *holler*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *nothing at the moment*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *gathering information*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *nothing in life is free*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 1*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *legalzoom*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*



**Image Set**

» **INCORPORATION CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Healthcare*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Pennsylvania*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Self employed*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

» *Some Other type of legal service*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

» *Some Other type of legal service*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Bing*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.incorporate.com*

» *www.rocketlawyer.com*

» *www.bizfilings.com*

» [www.incforsfree.com](http://www.incforsfree.com)

» [www.delawareinc.com](http://www.delawareinc.com)

» [www.calfilings.com](http://www.calfilings.com)

**Q3a** Why did you select this company? [www.incorporate.com](http://www.incorporate.com)

» *speed*

**Q3b** Anything else? [www.incorporate.com](http://www.incorporate.com)

» *accurate*

**Q3a** Why did you select this company? [www.rocketlawyer.com](http://www.rocketlawyer.com)

» *free*

**Q3b** Anything else? [www.rocketlawyer.com](http://www.rocketlawyer.com)

» *phone number*

**Q3a** Why did you select this company? [www.bizfilings.com](http://www.bizfilings.com)

» *looked quick*

**Q3b** Anything else? [www.bizfilings.com](http://www.bizfilings.com)

» *fast*

**Q3a** Why did you select this company? [www.incforsfree.com](http://www.incforsfree.com)

» *now*

**Q3b** Anything else? [www.incforsfree.com](http://www.incforsfree.com)

» *60,000*

**Q3a** Why did you select this company? [www.delawareinc.com](http://www.delawareinc.com)

» *experience*

**Q3b** Anything else? [www.delawareinc.com](http://www.delawareinc.com)

» *phone number*

**Q3a** Why did you select this company? [www.calfilings.com](http://www.calfilings.com)

» *experience*

**Q3b** Anything else? [www.calfilings.com](http://www.calfilings.com)

» *200,000*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» [www.legalzoom.com](http://www.legalzoom.com)

**Q4b** Please tell us why you did not << initially >> select [www.legalzoom.com](http://www.legalzoom.com)?

» *fast*

**Q4b** Please tell us why you did not << initially >> select [www.smallbiz.com](http://www.smallbiz.com)?

» *California*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *free plus state fees, did not offer LLC, S-corp definitions, pay by credit, offer elite services for speed and TIN*

**QB8** Anything else?

» *liked the tracker bar at the top*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» **Yes**

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» **Yes**

**QB10b1** Do you know if this state fee applies...

» *I don't know*

**QB10b2** Do you know if this state fee applies...

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» **Yes**

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *free phone number on screen*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *llc*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes free processing)*

**Q14b1** What made you decide to << insert >>?

» *free*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Recommendations from colleagues 2*

» *Personal experience on the website 3*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Price*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *I don't know*

**Image Set**

» ***DIVORCE CONTROL***

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» ***None of the above***

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» ***None of the above***

**S3** Please record your gender below.

» ***Female***

**S4** Which of the following categories includes your age?

» ***45-54***

**S5** Please indicate the state in which you reside.

» ***Arizona***

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» ***I Agree***

**S7** Which of the following best describes your employment status?

» ***Employed full-time***

**S8a** Which of the following best describes your position with your company?

» ***Middle Management***

**S8b** Do you have any aspirations or plans to start your own company/business?

» ***No***

**S9** Over the past few years, have you looked on the internet for online legal services?

» ***Yes***

**S10a** What specific legal services have you looked for online?

» ***Family law***

» ***Estate planning***

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» ***No***

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» ***No***

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» ***2 - Probably will not***

**S13a** Please tell us what kind of device you are taking this survey on.

» ***Computer or Laptop***

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» ***Used an internet search engine***

**Q1b** Which search engine did you use to look for online legal services?

» ***Google***

» ***Bing***

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» ***www.rocketlawyer.com***

**Q3a** Why did you select this company? www.rocketlawyer.com

» ***For all states was listed in the descriptions, and free divorce agreement listed.***

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» Yes, I have reviewed this page (Page 1)

» Yes, I have reviewed this page (Page 2)

» Yes, I have reviewed this page (Page 3)

» Yes, I have reviewed this page (Page 4)

» Yes, I have reviewed this page (Page 5)

» Yes, I have reviewed this page (Page 6)

» Yes, I have reviewed this page (Page 7)

» Yes, I have reviewed this page (Page 8)

» Yes, I have reviewed this page (Page 9)

» Yes, I have reviewed this page (Page 10)

» Yes, I have reviewed this page (Page 11)

» Yes, I have reviewed this page (Page 12)

» Yes, I have reviewed this page (Page 13)

» Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» Easy to use divorce filing form, free trial, then the ability to get a monthly or yearly membership for a fee with multiple types of legal documents available online, and with review with a local attorney of legal form completed. The ability to store all your legal documents in a central location for ease of use/retrieval.

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» a one week free trial offer, then if not cancelled would be \$19.95 a month for a monthly membership or \$9.95 per month paid in advanced yearly fee services

**QC11a** How would you describe the free trial offer to a friend?

» a 1 week free trial offer, with the ability to use and keep the document you created during the free trial basis.

**Q12a** Do you recall if the free trial offer has a time limit?

» Yes

**Q12c** What happens after the free trial period?

» 1 week period of time

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» they had listed a phone # on the screen, and a chat button

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» If the state of AZ and the local county of Maricopa family courts did not already have an outstanding site with free services/forms and easy FAQ and what to expect, would consider using if found the need or recommend to someone who did not have the resources living another area

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» Other specify: ("Not in the need now so N/A")

**Q14b1** What made you decide to << insert >>?

» Did not have a current need at this time so N/A

**Q14c** Why did you not choose to take the free trial << insert >>?

» Not needed at this time

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» The ability to get forms directly for government for free

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» Price 3

» Personal experience on the website 2

» The ability to get forms directly for government for free 1

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *a*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *I don't know*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Florida*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Intermediate level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Bing*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.lawdepot.com*

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *I've heard of them before.*

**Q3b** Anything else? www.legalzoom.com

» *they have been around for a while.*

**Q3a** Why did you select this company? www.lawdepot.com

» *I like the way the site looks.*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *I like the name, and the way it's presented.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *They provide a series of questions to complete the POA correctly and the way you want it to be.*

**QC8** Anything else?

» *They offer in person assistance at no additional cost. The first 30 day trial is free.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Free 30 days.*

**QC11a** How would you describe the free trial offer to a friend?

» *You can get legal documents for free within the first 30 days of your trial.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *your credit card will be billed unless you cancel.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *call a toll free number.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I've be very interested in their service and checking out the website.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *Just to compare what's available.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *I might, just not immediately until I've compared with the other sites.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 1*



» *Recommendations from colleagues 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *I don't know*

**Image Set**

» *BILL OF SALE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Technology*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *New York*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Intermediate level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Bill of Sale*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *iPad or Tablet*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *AOL*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *Unsure*

**Q3b** Anything else? www.rocketlawyer.com

» *No*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Can be free*

**QC8** Anything else?

» *No*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *No*

**QC11a** How would you describe the free trial offer to a friend?

» *Unsure*

**QC11b** Anything else?

» *No*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *See website*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Use it*

**Q13c** Anything else?

» *No*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *Ease*

**Q14b2** Any other reasons?

» *No*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Recommendations from colleagues 2*

» *Personal experience on the website 3*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Healthcare*

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Utah*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.lawdepot.com*

**Q3a** Why did you select this company? www.lawdepot.com

» *Sounds legit*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *name doesn't sound professional*

**Q4b** Please tell us why you did not << initially >> select www.uniformpowerofattorney.com?

» *name doesn't sound professional*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website? **EXHIBIT B -587-**

» **Yes**

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Free trial*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» **Yes**

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Can't recall. "Free trial" turned me off - sounds suspicious and unprofessional in the legal field.*

**QC11a** How would you describe the free trial offer to a friend?

» *I wouldn't*

**Q12a** Do you recall if the free trial offer has a time limit?

» **No**

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Don't know*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would still go to my personal attorney*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Decide not to buy an online legal service*

**Q14b1** What made you decide to << insert >>?

» *Would rather use / trust my personal attorney*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Would rather use / trust my own personal attorney*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Brand name 2*

» *Recommendations from colleagues 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Customer reviews*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Virginia**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Some other level**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.lawdepot.com**

» **www.rocketlawyer.com**

» **www.uniformpowerofattorney.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **raises legality question**

**Q3b** Anything else? www.legalzoom.com

» **URL in ad**

**Q3a** Why did you select this company? www.lawdepot.com

» **free - online forms**

**Q3b** Anything else? www.lawdepot.com

» *simple*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *5 minutes - do it fast*

**Q3b** Anything else? www.rocketlawyer.com

» *no*

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» *uniformity*

**Q3b** Anything else? www.uniformpowerofattorney.com

» *no*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *uses interview process tailored for individual states free trial requires credit card generates draft document*

**QC8** Anything else?

» *phone assistance available reviewed in various publications*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *need a credit card*

**QC11a** How would you describe the free trial offer to a friend?

» *standard stuff*

**QC11b** Anything else?

» *no*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *not sure*

**Q12c** Anything else?

» *no*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *phone or online chat*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *might use the service*

**Q13c** Anything else?

» *no*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen EXHIBIT 59?



» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *free and I will get what I need*

**Q14b2** Any other reasons?

» *no*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *approved/certified*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Personal experience on the website 3*

» *Opportunity to try the service for free 1*

» *approved/certified 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Recommendations from colleagues*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *netflix*

**Q15c** Anything else?

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» *BILL OF SALE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Georgia*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Estate planning*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *5 - Definitely will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Bill of Sale*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Didn't have to --- I already knew of a name and just went directly to the site*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.rocketlawyer.com*

» *www.jsbusinessproducts.btobsource.com*

» *www.officeconsultants.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *It has a good name.*

**Q3b** Anything else? www.legalcontracts.com

» *Also the ability to print immediately hooked me.*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *This has eSign capabilities.*

**Q3a** Why did you select this company? www.jsbusinessproducts.btobsources.com

» *The webname throws me off - but, I would still click on it to see what the site had.*

**Q3a** Why did you select this company? www.officeconsultants.com

» *I like the name.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *You have the option for a free one week trial.*

**QC8** Anything else?

» *After that week you will be charged.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Free for one week to try. But, a CC is needed. After the week is up, if you do not cancel, your CC will be charged for a subscription to the service.*

**QC11a** How would you describe the free trial offer to a friend?

» *You can get a free trial - but, remember to cancel if you do not want to be charged for a subscription.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *Your CC is charged.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Contacting Customer Service*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Sign up for the free trial - but, call customer service to cancel as soon as I printed my BoS.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *I just want one document and I do not want to be bothered with subscriptions.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *I do not want to have to remember to cancel the free trial.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Brand name 3*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Personal experience on the website*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **LEASE AGREEMENT CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Personal Care*

» *Healthcare*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Texas*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Landlord/tenant matters*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.lawdepot.com*

**Q3a** Why did you select this company? www.lawdepot.com

» *discusses leases*

**Q3b** Anything else? www.lawdepot.com

» *no*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *n/a*

**Q4b** Please tell us why you did not << initially >> select www.biztree.com?

» *n/a*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *n/a*

**QC8** Anything else?

» *n/a*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *I don't know*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *website*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *n/a*

**Q13c** Anything else?

» *n/a*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *I don't know*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *n/a*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Brand name 3*

» *Recommendations from colleagues 2*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *n/a*

**Q15c** Anything else?

» *n/a*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» **No**

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **65 or older**

**S5** Please indicate the state in which you reside.

» **Colorado**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Retired**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Estate planning**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

» **Yahoo**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.totallegal.com**

» **www.rocketlawyer.com**

**Q3a** Why did you select this company? www.totallegal.com

» **Low cost and easy to use**

**Q3a** Why did you select this company? www.rocketlawyer.com

» **FREE and I could print forms myself**

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.



» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It covers many if not all aspects as to my designated POA*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Free trial I don't recall length*

**QC11a** How would you describe the free trial offer to a friend?

» *I would tell them about the other varied options and also includes POA Free trial*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Do not recall*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would research further this site and compare with another site*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *Compare all options....All the nuances of my POA*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Comapre shopper*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 2*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **INCORPORATION CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None, I haven't taken a market research survey in the past 3 months**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **35-44**

**S5** Please indicate the state in which you reside.

» **Michigan**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Upper Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Estate planning**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **Yes**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Incorporation/forming a business or organization**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I share or would share this responsibility with others**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Asked friends/family**

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» **Yes**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **got good feedback**

**Q3b** Anything else? [www.legalzoom.com](http://www.legalzoom.com)

» *n/a*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.incorporate.com*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *no background*

**Q4b** Please tell us why you did not << initially >> select [www.calfilings.com](http://www.calfilings.com)?

» *no background*

**QB5a** Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

» *No*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *adequate*

**QB8** Anything else?

» *n/a*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *I don't know*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *oay or expire*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *check the iste, call for more info*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *check again when I'm ready to move forward*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Ask other people about the service*

**Q14b1** What made you decide to << insert >>?

» *verify what I've been told*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *verify!*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *n/a*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Recommendations from colleagues 1*

» *Personal experience on the website 2*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *I don't know*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Personal Care*

» *Food Brands or Products*

» *Healthcare*

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *65 or older*

**S5** Please indicate the state in which you reside.

» *Colorado*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed part-time*

**S8a** Which of the following best describes your position with your company?

» *Some other level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Estate planning*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *2 - Probably will not*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.lawdepot.com*

» *www.totallegal.com*

» *www.rocketlawyer.com*

» *www.uniformpowerofattorney.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *I have heard of Legalzoom.*

**Q3b** Anything else? www.legalzoom.com

» *No*

**Q3a** Why did you select this company? www.lawdepot.com

» *Looked like a possibility for free forms.*

**Q3b** Anything else? www.lawdepot.com

» *No.*

**Q3a** Why did you select this company? www.totallegal.com

» *I just like to check several sources.*

**Q3b** Anything else? www.totallegal.com

» *No.*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *It said it also included wills.*

**Q3b** Anything else? www.rocketlawyer.com

» *No.*

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» *It mentioned no hidden fee.*

**Q3b** Anything else? www.uniformpowerofattorney.com

» *No.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Free for one time use. \$14.99 for a month. \$9.99 for year.*

**QC8** Anything else?

» *No.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Don't recall specifically. I think you could get one form.*

**QC11a** How would you describe the free trial offer to a friend?

» *I would just mention that there was some kind of free trial.*

**QC11b** Anything else?

» *NO.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *I don't remember.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Don't remember.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Re-read the information.*

**Q13c** Anything else?

» *No.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *I probably would not need any more forms. I wouldn't want to pay for something I wouldn't use.*

**Q14b2** Any other reasons?

» *No.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 2*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *iPhone apps. Genealogy sites.*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**SURVEY 14-0603, CASE ID 2280**

**Image Set**

» ***BILL OF SALE CONTROL***

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» ***None of the above***

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» ***None of the above***

**S3** Please record your gender below.

» ***Male***

**S4** Which of the following categories includes your age?

» ***55-64***

**S5** Please indicate the state in which you reside.

» ***Mississippi***

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» ***I Agree***

**S7** Which of the following best describes your employment status?

» ***Self employed***

**S8b** Do you have any aspirations or plans to start your own company/business?

» ***No***

**S9** Over the past few years, have you looked on the internet for online legal services?

» ***Yes***

**S10a** What specific legal services have you looked for online?

» ***Bill of Sale***

» ***Estate planning***

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» ***No***

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» ***No***

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» ***4 - Probably will***

**S11b** Specifically, what types of online legal services will you be looking for?

» ***Landlord/tenant matters***

**S13a** Please tell us what kind of device you are taking this survey on.

» ***Computer or Laptop***

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» ***Used an internet search engine***

**Q1b** Which search engine did you use to look for online legal services?

» ***Google***

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» ***www.officeconsultants.com***

**Q3a** Why did you select this company? www.officeconsultants.com

» ***looked legit and said free***

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?



» *www.rocketlawyer.com*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *rocket lawyer??*

**Q4b** Please tell us why you did not << initially >> select www.jsbusinessproducts.btobsource.com?

» *didnt catch my attention*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *it is complete*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *dont remember*

**QC11a** How would you describe the free trial offer to a friend?

» *dont remember*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *dont remember*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would consider it, it was complete*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *to check it out*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 3*

» *Personal experience on the website 2*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Some other level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Landlord/tenant matters*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Spoke to a lawyer*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *I've heard ads for them, never heard of any of the others.*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.totallegal.com?

» *I've never heard of them*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *Never heard of them and I wonder what does "free power of attorney month" mean?*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» **Yes**

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *You can get a free month of service*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» **Yes**

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *a month*

**QC11a** How would you describe the free trial offer to a friend?

» *a month of free service*

**Q12a** Do you recall if the free trial offer has a time limit?

» **Yes**

**Q12c** What happens after the free trial period?

» *you have to pay or quit*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *contact them*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Not sign up with them because I do not want to use my Facebook or Google+ accounts for this. I would prefer setting up an account with this company specifically. I don't trust those companies with my data.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Decide not to buy an online legal service*

**Q14b1** What made you decide to << insert >>?

» *Everything online is vulnerable*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Not interested in online legal service*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Security*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Recommendations from colleagues 2*

» *Security 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Customer reviews*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Florida*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.totallegal.com*

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *I've already used this source for my own will and was happy with the results*

**Q3a** Why did you select this company? www.totallegal.com

» *"Free" is good and forms/laws vary from state to state. Looks like these people are on their ball game*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *Good variety of products listed*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» Yes, I have reviewed this page (Page 2)

» Yes, I have reviewed this page (Page 3)

» Yes, I have reviewed this page (Page 4)

» Yes, I have reviewed this page (Page 5)

» Yes, I have reviewed this page (Page 6)

» Yes, I have reviewed this page (Page 7)

» Yes, I have reviewed this page (Page 8)

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» Yes, I have reviewed this page (Page 10)

» Yes, I have reviewed this page (Page 11)

» Yes, I have reviewed this page (Page 12)

» Yes, I have reviewed this page (Page 13)

» Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *They are thorough, but a rip off*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *1 week trial, but give them your credit card number for auto monthly payments. a rip off*

**QC11a** How would you describe the free trial offer to a friend?

» *Don't even think about it*

**Q12a** Do you recall if the free trial offer has a time limit?

» Yes

**Q12c** What happens after the free trial period?

» *they start billing the credit card that you HAD to give them for the free trial*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Electronically or via phone*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Look elsewhere*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Decide not to buy an online legal service*

**Q14b1** What made you decide to << insert >>?

» *If this exemplifies what the online services are like, I will go to a real person in an office*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *It is not a free trial. You must give them a credit card and they will then charge your card.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Honest*

» *Not a credit card rip off*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Brand name 3*

» *Honest 1*

» *Not a credit card rip off 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Price*

» *Advertisement*

» *Customer reviews*

» *Recommendations from colleagues*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Free Credit score.com*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» **No**



**Image Set**

» *BILL OF SALE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *North Carolina*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Owner/Proprietor*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

» *Family law*

» *Bill of Sale*

» *Landlord/tenant matters*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *2 - Probably will not*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *the ad copy*

**Q3b** Anything else? *www.legalcontracts.com*

» *looked like it might be quick and easy*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.rocketlawyer.com*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *name. Wasn't first*

**Q4b** Please tell us why you did not << initially >> select *www.officeconsultants.com*?

» *name*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *free for a week. Requires credit card sign up with FB*

**QC8** Anything else?

» *Can also sign up with google*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *one week*

**QC11a** How would you describe the free trial offer to a friend?

» *they have a one week free trial*

**QC11b** Anything else?

» *have create an account and provide billing details.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *credit card is billed*

**Q12c** Anything else?

» *not sure*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *chat, telephone support*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *might use it*

**Q13c** Anything else?

» *not really*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *it's free*

**Q14b2** Any other reasons?

» *easy to use*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *look and feel*

» *ease of use*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *look and feel 3*

» *ease of use 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Customer reviews*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15c** Anything else?

» *can't think of any recently*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» *DIVORCE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Minnesota*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed part-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Landlord/tenant matters*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Used a phone book*

» *Asked friends/family*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.lawdepot.com*

» *www.completetecase.com*

» *www.uslegalforms.com*

**Q3a** Why did you select this company? www.lawdepot.com

» *The word Free*

**Q3b** Anything else? www.lawdepot.com

» *Same as above Fill out our own*

**Q3a** Why did you select this company? www.completecase.com

» *Don't need a lawyer, no paying a lawyer*

**Q3b** Anything else? www.completecase.com

» *Can do on our own*

**Q3a** Why did you select this company? www.uslegalforms.com

» *Because I can search for what I need and then download the form.*

**Q3b** Anything else? www.uslegalforms.com

» *Can do on our own, no lawyer involvement*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *Lawyers involved*

**Q4b** Please tell us why you did not << initially >> select www.divorcewriter.com?

» *Money involved*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *After looking at the website, I would be more likely to use. I see you have a chat section for asking questions and the website looks pretty user-friendly.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *one week free I think it was a week or was it a month. Sorry. Memory bad.*

**QC11a** How would you describe the free trial offer to a friend?

» *You can sign up and get free forms.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *I did not look that far, I believe it was something to do with going up to \$9 a month or was it a year. Sorry again not the best at retaining information when I only look at something once. I should have thought harder.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *I can chat with someone*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would most likely now use this site. Seems low cost enough. And, looks user-friendly and has chat.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *I would take the free trial to see how easy everything is to get around. If I couldn't do anything I would take the next option so I could ask questions on chat.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Chat line*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Opportunity to try the service for free 1*

» *Chat line 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **INCORPORATION CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **Food Brands or Products**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **35-44**

**S5** Please indicate the state in which you reside.

» **Colorado**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Retired**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

» **Estate planning**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **2 - Probably will not**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I am or would be the primary decision maker**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Spoke to a lawyer**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.incorporate.com**

» **www.legalzoom.com**

» **www.rocketlawyer.com**

» *www.bizfilings.com*

**Q3a** Why did you select this company? *www.incorporate.com*

» *order of search results, amount of information from search*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *search order and info from search*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *price sounded interesting*

**Q3a** Why did you select this company? *www.bizfilings.com*

» *search order and info from search*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.incfree.com*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *easy way to incorporate*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *I don't know*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *I don't know*

**QB10b2** Do you know if this state fee applies...

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *don't remember*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *internet, e-mail, phone*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *nothing*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Ask other people about the service*

**Q14b1** What made you decide to << insert >>?



» *get more information*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *want to know more details*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 1*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 2316**

**Image Set**

» *BILL OF SALE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Arizona*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Intermediate level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Family law*

» *Bill of Sale*

» *Landlord/tenant matters*

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Bill of Sale*

» *Landlord/tenant matters*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

- » *Used a phone book*
- » *Asked friends/family*
- » *Asked colleagues*
- » *Spoke to a lawyer*

**Q1b** Which search engine did you use to look for online legal services?

- » *Google*
- » *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

- » *www.officeconsultants.com*

**Q3a** Why did you select this company? *www.officeconsultants.com*

- » *It appealed to me*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

- » *None*

**Q4b** Please tell us why you did not << initially >> select *www.legalcontracts.com*?

- » *It looks like you have to pay*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

- » *I am not sure I trust the site*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

- » *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

- » *Yes, I have reviewed this page (Page 1)*
- » *Yes, I have reviewed this page (Page 2)*
- » *Yes, I have reviewed this page (Page 3)*
- » *Yes, I have reviewed this page (Page 4)*
- » *Yes, I have reviewed this page (Page 5)*
- » *Yes, I have reviewed this page (Page 6)*
- » *Yes, I have reviewed this page (Page 7)*
- » *Yes, I have reviewed this page (Page 8)*
- » *Yes, I have reviewed this page (Page 9)*
- » *Yes, I have reviewed this page (Page 10)*
- » *Yes, I have reviewed this page (Page 11)*
- » *Yes, I have reviewed this page (Page 12)*
- » *Yes, I have reviewed this page (Page 13)*
- » *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

- » *I learned that I can receive live legal help and that I can print forms.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

- » *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

- » *7 day*

**QC11a** How would you describe the free trial offer to a friend?

- » *I would say that you need to cancel or you will be billed.*

**Q12a** Do you recall if the free trial offer has a time limit?

- » *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

- » *Call*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

- » *I would print the form*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Ask other people about the service*

**Q14b1** What made you decide to << insert >>?

» *I do not trust websites*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *I am not in need of it at this time*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Price*

» *Recommendations*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Personal experience on the website 2*

» *Price 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Lots of businesses use a free trial*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» **INCORPORATION TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Massachusetts**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **2 - Probably will not**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I am or would be the primary decision maker**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.incorporate.com**

» **www.legalzoom.com**

» **www.bizfilings.com**

» **www.incfile.com**

» **www.incfree.com**

» [www.mycorporation.com](http://www.mycorporation.com)

**Q3a** Why did you select this company? [www.incorporate.com](http://www.incorporate.com)

» *part of learning how to set up*

**Q3b** Anything else? [www.incorporate.com](http://www.incorporate.com)

» *Used as one of many for research*

**Q3a** Why did you select this company? [www.legalzoom.com](http://www.legalzoom.com)

» *Used as one of many for research*

**Q3a** Why did you select this company? [www.bizfilings.com](http://www.bizfilings.com)

» *Used as one of many for research*

**Q3a** Why did you select this company? [www.incfile.com](http://www.incfile.com)

» *Used as one of many for research*

**Q3a** Why did you select this company? [www.incforfree.com](http://www.incforfree.com)

» *Used as one of many for research*

**Q3a** Why did you select this company? [www.mycorporation.com](http://www.mycorporation.com)

» *Used as one of many for research*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» [www.rocketlawyer.com](http://www.rocketlawyer.com)

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *Name does not look as professional as others*

**Q4b** Please tell us why you did not << initially >> select [www.directincorporation.com](http://www.directincorporation.com)?

» *Looks specific to Calif.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *Easy to follow, help available on each page, short money*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *...to all businesses that you want to incorporate regardless of how you chose to file your incorporation papers*

**QB10b2** Do you know if this state fee applies...

» *...if you incorporate through any online legal services company*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» **Yes**

**Q12c** What happens after the free trial period?

» *Pay fee if you want to continue*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *email, phone*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *I would use an on-line process*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes free processing)*

**Q14b1** What made you decide to << insert >>?

» *For questions that may come up during or after incorporation*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 1*

» *Personal experience on the website 2*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *LinkedIn upgrade*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» **Yes**

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *65 or older*

**S5** Please indicate the state in which you reside.

» *Texas*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Retired*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Estate planning*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.totallegal.com*

**Q3a** Why did you select this company? www.totallegal.com

» *Familiar with name*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.legalzoom.com?

» *already had picked the one I wanted*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?



» *already had picked the one I wanted*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» Yes

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» Yes, I have reviewed this page (Page 1)

» Yes, I have reviewed this page (Page 2)

» Yes, I have reviewed this page (Page 3)

» Yes, I have reviewed this page (Page 4)

» Yes, I have reviewed this page (Page 5)

» Yes, I have reviewed this page (Page 6)

» Yes, I have reviewed this page (Page 7)

» Yes, I have reviewed this page (Page 8)

» Yes, I have reviewed this page (Page 9)

» Yes, I have reviewed this page (Page 10)

» Yes, I have reviewed this page (Page 11)

» Yes, I have reviewed this page (Page 12)

» Yes, I have reviewed this page (Page 13)

» Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *easy to use but since all questions were California POA and I live in Texas not sure everything is the same and thus possibly useless unless person was from California..*

**QC8** Anything else?

» *\$20 a month for a POA seems absurd*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *A month free*

**QC11a** How would you describe the free trial offer to a friend?

» *I wouldn't recommend any online legal advise to a friend I wanted to keep*

**Q12a** Do you recall if the free trial offer has a time limit?

» Yes

**Q12c** What happens after the free trial period?

» *You get charged*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *there was a chat I think may have missed that*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *find a base form that was free and fill in the blanks*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Decide not to buy an online legal service*

**Q14b1** What made you decide to << insert >>?

» *skeptical about legal issues online*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *nothing is free*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Brand name 1*

» *Personal experience on the website 2*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Customer reviews*

» *Recommendations from colleagues*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *nothing comes to mind specifically*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **65 or older**

**S5** Please indicate the state in which you reside.

» **Texas**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Retired**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Estate planning**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **iPad or Tablet**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.lawdepot.com**

» **www.uniformpowerofattorney.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **Accepted in all 50 states.**

**Q3a** Why did you select this company? www.lawdepot.com

» **Lawyer drafted.**

**Q3b** Anything else? www.lawdepot.com

» *Free*

**Q3a** Why did you select this company? [www.uniformpowerofattorney.com](http://www.uniformpowerofattorney.com)

» *State specific*

**Q3b** Anything else? [www.uniformpowerofattorney.com](http://www.uniformpowerofattorney.com)

» *No hidden fees*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *[www.totallegal.com](http://www.totallegal.com)*

**Q4b** Please tell us why you did not << initially >> select [www.totallegal.com](http://www.totallegal.com)?

» *Liked others better*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *Not impressed by Google followers*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Seemed fairly straightforward. Assume that if sign up for monthly service can cancel at any time.*

**QC8** Anything else?

» *Like that can have local lawyer review,*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Think it was for one month.*

**QC11a** How would you describe the free trial offer to a friend?

» *Try website for free with no obligation.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Assume can ask questions and get answers off the website.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *May research them further*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *I don't know*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Want to further check out other sites. Some indicate they are free.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Customer reviews 3*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *I don't know*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *65 or older*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Owner/Proprietor*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Didn't have to --- I already knew of a name and just went directly to the site*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *Have heard their ads on the radio*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *free - print forms in 5 minutes makes it seem very easy to do*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

- » *Yes, I have reviewed this page (Page 7)*
- » *Yes, I have reviewed this page (Page 8)*
- » *Yes, I have reviewed this page (Page 9)*
- » *Yes, I have reviewed this page (Page 10)*
- » *Yes, I have reviewed this page (Page 11)*
- » *Yes, I have reviewed this page (Page 12)*
- » *Yes, I have reviewed this page (Page 13)*
- » *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *free form but service will cost after one week free trial. Other options are \$9.99 per month but payable in one payment or \$19.99 per month afterwards with initial review of document/s and then review of them.*

**QC8** Anything else?

» *Very thorough breakdown on what the form covers and does not cover about the service.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *No payment for one week during free trial*

**QC11a** How would you describe the free trial offer to a friend?

» *Complete the form, form reviewed by service and no need to pay upfront for the form/service*

**QC11b** Anything else?

» *Other options are monthly payment aor lower rate with all payment upfront*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *either cancel or make payment - choice of options*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *There is a toll-free number listed*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would go on-line to contact them*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *would like to try it and see if I thought it was of value*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Brand name 2*

» *Recommendations from colleagues 3*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Personal experience on the website*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» *BILL OF SALE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Technology*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Virginia*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Bill of Sale*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*



**Q3a** Why did you select this company? www.legalcontracts.com

» *top of list*

**Q3b** Anything else? www.legalcontracts.com

» *seems legit*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.jsbusinessproducts.btobsource.com*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *name sounds hokey*

**Q4b** Please tell us why you did not << initially >> select www.officeconsultants.com?

» *"(Free)" seems suspicious*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Go through a bunch of pages then have to give credit card info*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *1 week free*

**QC11a** How would you describe the free trial offer to a friend?

» *scam*

**QC11b** Anything else?

» *have to give credit card info. may be hard to cancel*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *pay*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *not sure*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *find another site where its no strings attached*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *dont want to give payment info*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *dont want hassle of cancelling*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 3*

» *Recommendations from colleagues 2*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» **INCORPORATION CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **Healthcare**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Nebraska**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Incorporation/forming a business or organization**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I am or would be the primary decision maker**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.incorporate.com**

» **www.rocketlawyer.com**

» **www.incfree.com**

» **www.delawareinc.com**

**Q3a** Why did you select this company? www.incorporate.com

» **looks like immediate action**

**Q3a** Why did you select this company? www.rocketlawyer.com

» **Free always sounds good**

**Q3a** Why did you select this company? [www.incforfree.com](http://www.incforfree.com)

» *Free always sounds good*

**Q3a** Why did you select this company? [www.delawareinc.com](http://www.delawareinc.com)

» *sounded like immediate work*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *[www.mycorporation.com](http://www.mycorporation.com)*

**Q4b** Please tell us why you did not << initially >> select [www.legalzoom.com](http://www.legalzoom.com)?

» *sounds like they know what they are doing*

**Q4b** Please tell us why you did not << initially >> select [www.mycorporation.com](http://www.mycorporation.com)?

» *sounds like they know what they are doing*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *looks very thorough and has the services I will need*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *I would hope there is a way to contact them*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *I might use them or explore local legal firms*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Other specify: ("keep looking")*

**Q14b1** What made you decide to << insert >>?

» *I want to keep looking all over, not just the internet*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *again, I want to keep exploring*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price* 3

» *Customer reviews* 2

» *Brand name* 1

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *cabela's*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» *LEASE AGREEMENT TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Healthcare*

» *Technology*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Oklahoma*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Landlord/tenant matters*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.lawdepot.com*

**Q3a** Why did you select this company? www.lawdepot.com

» *It specifically stated the reason I was looking.*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *The description is not specific to my needs*

**Q4b** Please tell us why you did not << initially >> select www.biztree.com?

» *The description is not specific to my needs.*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website? **EXHIBIT B -645-**

» Yes

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» Yes, I have reviewed this page (Page 1)

» Yes, I have reviewed this page (Page 2)

» Yes, I have reviewed this page (Page 3)

» Yes, I have reviewed this page (Page 4)

» Yes, I have reviewed this page (Page 5)

» Yes, I have reviewed this page (Page 6)

» Yes, I have reviewed this page (Page 7)

» Yes, I have reviewed this page (Page 8)

» Yes, I have reviewed this page (Page 9)

» Yes, I have reviewed this page (Page 10)

» Yes, I have reviewed this page (Page 11)

» Yes, I have reviewed this page (Page 12)

» Yes, I have reviewed this page (Page 13)

» Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It is a subscription.*

**QC8** Anything else?

» *They have your information.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *2 weeks free*

**QC11a** How would you describe the free trial offer to a friend?

» *2 weeks free*

**Q12a** Do you recall if the free trial offer has a time limit?

» Yes

**Q12c** What happens after the free trial period?

» *Not sure*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Call them*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Look for forms I can complete myself*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *I don't like sites that required a subscription.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *They are usually hard to get stopped after the trail period.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Advertisement 2*

» *Brand name 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Do not recall*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*



**Image Set**

» *DIVORCE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

» *Technology*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *New Jersey*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Family law*

» *Landlord/tenant matters*

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» *Yes*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *It is more general and free--not just for one state*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It is very user friendly.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Free for a short period*

**QC11a** How would you describe the free trial offer to a friend?

» *You can check it out with a free trial and can cancel if you are not pleased with it.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *I guess you can call the company.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would probably go ahead and fill it out.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *Not sure if I would need again so soon.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Recommendations from colleagues 2*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Credit score company*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» Yes

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **Healthcare**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **65 or older**

**S5** Please indicate the state in which you reside.

» **Maryland**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Retired**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Estate planning**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

» **Bing**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.lawdepot.com**

» **www.totallegal.com**

» **www.rocketlawyer.com**

» **www.uniformpowerofattorney.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **I have heard of them before**

**Q3b** Anything else? www.legalzoom.com

» *I think I have explored them a couple years ago*

**Q3a** Why did you select this company? www.lawdepot.com

» *I like that it is free*

**Q3b** Anything else? www.lawdepot.com

» *the line "Answer Simple questions - Get Immediate Results - Lawyer Drafted" got my attention*

**Q3a** Why did you select this company? www.totallegal.com

» *I like free*

**Q3b** Anything else? www.totallegal.com

» *"forms for every state" got my attention*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *I like free*

**Q3b** Anything else? www.rocketlawyer.com

» *sounds like I could ask a lawyer a question if I had one during the process.*

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» *I like "no hidden fee"*

**Q3b** Anything else? www.uniformpowerofattorney.com

» *like state specific*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *They guide you through the important points and offer you on-line help. They keep their word in the form of a free trial.*

**QC8** Anything else?

» *"Free" disappears if you forget to cancel within 7 days of use.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *7 days free. A fee of almost \$20/month would be charged if you want to continue the service*

**QC11a** How would you describe the free trial offer to a friend?

» *7 day free trial. Easy walk through of key info that gets inserted into the boilerplate document*

**QC11b** Anything else?

» *Not sure if the free trial included a free printable download of the finished product or just a read only version.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *you will be charged about \$20 if you do not cancel*

**Q12c** Anything else?

» *you can purchase the full service for additional needs.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *online chat*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *go on line and try it*

**Q13c** Anything else?

» *probably only use the free service offer*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *looks easy to use*

**Q14b2** Any other reasons?

» *is free*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Personal experience on the website 2*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *credit score companies*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *65 or older*

**S5** Please indicate the state in which you reside.

» *Washington (state)*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Retired*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Estate planning*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Other specify: ("Don't remember")*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.lawdepot.com*

» *www.totallegal.com*

» *www.uniformpowerofattorney.com*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *Appears to have info about what is legal in your state*

**Q3a** Why did you select this company? *www.lawdepot.com*

» *May have info if I have any questions*

**Q3a** Why did you select this company? www.totallegal.com

» *Like the idea of filling in on line.*

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» *Like that I can download the forms for future use*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.rocketlawyer.com*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *Don't know, I guess the name did not appeal*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Easy to fill out forms. One week free then a monthly fee for a local attorney if you need one.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *One week free*

**QC11a** How would you describe the free trial offer to a friend?

» *You can use the service for free for the first week.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *A monthly fee of \$17.95*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Via the web site*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *nothing would not use*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Other specify: ("Would not use")*

**Q14b1** What made you decide to << insert >>?

» *I have a friend who is an attorney and would use him if needed.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Same answer*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*



**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews* 3

» *Recommendations from colleagues* 1

» *Personal experience on the website* 2

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Angie's List*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» *DIVORCE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Personal Care*

» *Food Brands or Products*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Florida*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Landlord/tenant matters*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.3stepdivorce.com*

» *www.completecase.com*

**Q3a** Why did you select this company? www.3stepdivorce.com

» *3 easy steps!*

**Q3b** Anything else? www.3stepdivorce.com

» *no*

**Q3a** Why did you select this company? www.completecase.com

» *do it yourself*

**Q3b** Anything else? [www.completecase.com](http://www.completecase.com)

» *seems easy based on name*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.lawdepot.com*

» *www.rocketlawyer.com*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *the name*

**Q4b** Please tell us why you did not << initially >> select [www.uslegalforms.com](http://www.uslegalforms.com)?

» *forms available*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *straight forward and easy to understand process*

**QC8** Anything else?

» *small fee*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *it was time limited*

**QC11a** How would you describe the free trial offer to a friend?

» *most likely would need to purchase and wouldn't be free*

**QC11b** Anything else?

» *no*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *a few days*

**Q12c** Anything else?

» *no*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *online chat*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *keep looking*

**Q13c** Anything else?

» *no*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *best to shop around first*

**Q14b2** Any other reasons?

» *no*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *wanted to explore options*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Recommendations from colleagues 3*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Customer reviews*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» *BILL OF SALE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Minnesota*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Owner/Proprietor*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

» *Bill of Sale*

» *Landlord/tenant matters*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *Yes*

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» *Yes*

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» *Yes*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *N/A.*

**Q3b** Anything else? *www.legalcontracts.com*

» *N/A.*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.jsbusinessproducts.btobsource.com*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *N/A.*

**Q4b** Please tell us why you did not << initially >> select *www.jsbusinessproducts.btobsource.com*?

» *N/A.*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *N/A.*

**QC8** Anything else?

» *N/A.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *N/A.*

**QC11a** How would you describe the free trial offer to a friend?

» *N/A.*

**QC11b** Anything else?

» *N/A.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *N/A.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *N/A.*

**Q13c** Anything else?

» *N/A.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Enroll in an annual plan (access to all forms and attorney services immediately for \$9.99 a month when prepaying for one year)*

**Q14b1** What made you decide to << insert >>?

» *N/A.*

**Q14b2** Any other reasons?

» *N/A.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *N/A.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Customer reviews 3*

» *Brand name 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *N/A.*

**Q15c** Anything else?

» *N/A.*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» *POWER OF ATTORNEY TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

» *Healthcare*

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *65 or older*

**S5** Please indicate the state in which you reside.

» *Texas*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Some other level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *AOL*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.lawdepot.com*

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? www.lawdepot.com

» *Free, need simple questions answered and if needed would draw up draft of whatever I might need*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *Also has the forms that I could possibly use, could ask and answer questions if needed.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*



- » Yes, I have reviewed this page (Page 2)
- » Yes, I have reviewed this page (Page 3)
- » Yes, I have reviewed this page (Page 4)
- » Yes, I have reviewed this page (Page 5)
- » Yes, I have reviewed this page (Page 6)
- » Yes, I have reviewed this page (Page 7)
- » Yes, I have reviewed this page (Page 8)
- » Yes, I have reviewed this page (Page 9)
- » Yes, I have reviewed this page (Page 10)
- » Yes, I have reviewed this page (Page 11)
- » Yes, I have reviewed this page (Page 12)
- » Yes, I have reviewed this page (Page 13)
- » Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

- » *Very detailed in all categories where a POA would be needed.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

- » Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

- » *free for one document only on a trial basis*

**QC11a** How would you describe the free trial offer to a friend?

- » *trial offer is free but only one document, if you want more in depth use of the POA you can sign up and pay accordingly*

**Q12a** Do you recall if the free trial offer has a time limit?

- » *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

- » *the answers would be I think on the webpage.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

- » *Me personally, it would not help me, as I need the POA for my partner.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

- » *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

- » *To see what action I need to know about when the person I am caring for is terminal.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

- » *It did not handle the situation that I am currently in.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

- » *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

- » *Price 2*

- » *Customer reviews 3*

- » *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

- » *Advertisement*

- » *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

- » No

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **Minnesota**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Upper Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.lawdepot.com**

» **www.totallegal.com**

» **www.rocketlawyer.com**

» **www.uniformpowerofattorney.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **It appears to be what I am looking for, and it is first**

**Q3b** Anything else? www.legalzoom.com

» **NO**

**Q3a** Why did you select this company? www.lawdepot.com

» **It appears to be what I am looking for, and it is on the first page**

**Q3b** Anything else? www.lawdepot.com

» *NO*

**Q3a** Why did you select this company? www.totallegal.com

» *It appears to be what I am looking for, and it is on the first page*

**Q3b** Anything else? www.totallegal.com

» *No*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *It appears to be what I am looking for, and it is on the first page*

**Q3b** Anything else? www.rocketlawyer.com

» *NO*

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» *It appears to be what I am looking for, and it is on the first page*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *There is a free trial, and then 19.95/month*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Free month, and then 19.95/month*

**QC11a** How would you describe the free trial offer to a friend?

» *Free trial, but you have to cancel within 30 days if you don't want to be charged going forward*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *You get billed 19.95/month*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *email address, and I think a phone number*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Sign up*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *No risk, and the site seems to be organized and useful*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company.

Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Customer reviews 3*

» *Recommendations from colleagues 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Texas**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Estate planning**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **Have heard about it before.**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» **www.lawdepot.com**

**Q4b** Please tell us why you did not << initially >> select www.lawdepot.com?

» *second choice*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *Sounds cheesy*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *easy to appoint a power of attorney*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *1 week*

**QC11a** How would you describe the free trial offer to a friend?

» *1 week free*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *1 week*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *contact them*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *don't need a power of attorney*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Enroll in a monthly plan (access to all forms and help from attorneys for \$17.95 per month, includes attorney review of forms after 90 days)*

**Q14b1** What made you decide to << insert >>?

» *easy to cancel*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *need for a little while*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 1*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

» *Recommendations from colleagues*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Florida**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **iPad or Tablet**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Asked friends/family**

**Q1b** Which search engine did you use to look for online legal services?

» **Yahoo**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.lawdepot.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **I have looked at their website in the past 3 months and it appears they offer what I would be interested in.**

**Q3a** Why did you select this company? www.lawdepot.com

» **because they have online legal forms.**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» **www.uniformpowerofattorney.com**

**Q4b** Please tell us why you did not << initially >> select www.totallegal.com?

» **The advertise you can download the forms.**



**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *Don't like the name.*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» Yes

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *it is free for a week, prepay for a year, or pay by the month.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *It was free for a week.*

**QC11a** How would you describe the free trial offer to a friend?

» *That you can use their web site for a free trail of 1 week.*

**Q12a** Do you recall if the free trial offer has a time limit?

» Yes

**Q12c** What happens after the free trial period?

» *You would need to pay for a month or a year.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Their was a toll free number to call.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would be interested in trying out the site to see if it would meet my needs.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *I like the free trail offer to see if it meets my need.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Personal experience on the website 3*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» ***INCORPORATION TEST***

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» ***None of the above***

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» ***None, I haven't taken a market research survey in the past 3 months***

**S3** Please record your gender below.

» ***Female***

**S4** Which of the following categories includes your age?

» ***35-44***

**S5** Please indicate the state in which you reside.

» ***Texas***

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» ***I Agree***

**S7** Which of the following best describes your employment status?

» ***Employed full-time***

**S8a** Which of the following best describes your position with your company?

» ***Upper Management***

**S8b** Do you have any aspirations or plans to start your own company/business?

» ***Yes***

**S9** Over the past few years, have you looked on the internet for online legal services?

» ***Yes***

**S10a** What specific legal services have you looked for online?

» ***Incorporation/forming a business or organization***

» ***Family law***

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» ***No***

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» ***No***

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» ***5 - Definitely will***

**S11b** Specifically, what types of online legal services will you be looking for?

» ***Incorporation/forming a business or organization***

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» ***I am or would be the primary decision maker***

**S13a** Please tell us what kind of device you are taking this survey on.

» ***Computer or Laptop***

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» ***Used an internet search engine***

» ***Asked friends/family***

**Q1b** Which search engine did you use to look for online legal services?

» ***Google***

» *Yahoo*

» *Bing*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.rocketlawyer.com*

» *www.incfiile.com*

» *www.incforsfree.com*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *Because nothing is better than FREE.*

**Q3b** Anything else? *www.rocketlawyer.com*

» *No*

**Q3a** Why did you select this company? *www.incfiile.com*

» *Nice price*

**Q3b** Anything else? *www.incfiile.com*

» *No*

**Q3a** Why did you select this company? *www.incforsfree.com*

» *Love the FREE idea*

**Q3b** Anything else? *www.incforsfree.com*

» *No*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.incorporate.com*

**Q4b** Please tell us why you did not << initially >> select *www.incorporate.com*?

» *Seems knowledgeable*

**Q4b** Please tell us why you did not << initially >> select *www.legalzoom.com*?

» *Friend had a bad experience with them.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *Seems like a pretty good one. Simple to fill out and didn't take much thinking.*

**QB8** Anything else?

» *No.*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *No*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *I don't know*

**QB10b2** Do you know if this state fee applies...

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Contact Customer Service*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *Check all options before deciding.*

**Q13c** Anything else?

» *No*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *Just want to see what's all out there and see to it that I'm getting the best service for the best price.*

**Q14b2** Any other reasons?

» *No.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *That is what I would have chosen.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 3*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» *DIVORCE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *free*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» Yes, I have reviewed this page (Page 8)

» Yes, I have reviewed this page (Page 9)

» Yes, I have reviewed this page (Page 10)

» Yes, I have reviewed this page (Page 11)

» Yes, I have reviewed this page (Page 12)

» Yes, I have reviewed this page (Page 13)

» Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *they provide the document you fill it out and they go over it*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» 90 days

**QC11a** How would you describe the free trial offer to a friend?

» yes

**Q12a** Do you recall if the free trial offer has a time limit?

» Yes

**Q12c** What happens after the free trial period?

» 90 days

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» 1800 number or online

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *contact a lawyer in person*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *just to check it out*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *free trial*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Opportunity to try the service for free 3*

» *free trial 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Recommendations from colleagues*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» No

**Image Set**

» **INCORPORATION TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Healthcare*

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *25-34*

**S5** Please indicate the state in which you reside.

» *Minnesota*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

» *Landlord/tenant matters*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.bizfilings.com*

» *www.incfile.com*

» *www.incfree.com*

**Q3a** Why did you select this company? *www.legalzoom.com*



» *I've heard radio ads for legalzoom so I'm familiar with the brand*

**Q3a** Why did you select this company? [www.bizfilings.com](http://www.bizfilings.com)

» *They mention filing online, which I would probably prefer*

**Q3a** Why did you select this company? [www.incfile.com](http://www.incfile.com)

» *The \$49 price was attractive, especially not knowing how much it usually costs*

**Q3a** Why did you select this company? [www.incfree.com](http://www.incfree.com)

» *Because it mentioned filing for free*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *[www.incorporate.com](http://www.incorporate.com)*

» *[www.mycorporation.com](http://www.mycorporation.com)*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *rocketlawyer.com doesn't sound very professional. Also, it mention California specifically when I'm not in that state.*

**Q4b** Please tell us why you did not << initially >> select [www.smallbiz.com](http://www.smallbiz.com)?

» *It specifically mentions California, which is not the state I'm in*

**QB5a** Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

» *Yes*

**QB5b** Thinking back to the Google search page, please tell us what you recall about the Rocket Lawyer ad.

» *I though Rocket Lawyer was an unprofessional name for a law firm, so I skipped over them.*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *They specified incorporation in California at a low cost in addition to fees required by the state.*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *No*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *I don't know*

**QB10b2** Do you know if this state fee applies...

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *You are charged the normal monthly fee*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Contact customer service*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *Check other online providers to see if their cost is comparable to Rocket Lawyer*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *Interested in getting the best price. Assuming a site is reputable, the difference in service is probably not too important for this service.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Did not want to be responsible for recurring fee*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 1*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Shoprunner, Netflix, Amazon Prime, Hulu Plus*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

» *Healthcare*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Indiana*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Other specify: ("Have not yet, but would probably use a search engine")*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.lawdepot.com*

» *www.totallegal.com*

» *www.rocketlawyer.com*

» *www.uniformpowerofattorney.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *When I use a search engine I try to read, or at least glance at, all relevant "hits".*

**Q3b** Anything else? www.legalzoom.com

» *No*

**Q3a** Why did you select this company? www.lawdepot.com

» *When I use a search engine I try to read, or at least glance at, all relevant "hits".*

**Q3b** Anything else? www.lawdepot.com

» *No*

**Q3a** Why did you select this company? www.totallegal.com

» *When I use a search engine I try to read, or at least glance at, all relevant "hits".*

**Q3b** Anything else? www.totallegal.com

» *No*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *When I use a search engine I try to read, or at least glance at, all relevant "hits".*

**Q3b** Anything else? www.rocketlawyer.com

» *No*

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» *When I use a search engine I try to read, or at least glance at, all relevant "hits".*

**Q3b** Anything else? www.uniformpowerofattorney.com

» *No*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Seems reasonable, but I would not provide my credit card number if I was choosing the Free Trial Period.*

**QC8** Anything else?

» *I would not have a need to have a multiple month membership.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Free for one week, but you still had to provide credit card information.*

**QC11a** How would you describe the free trial offer to a friend?

» *Same as my last comment.*

**QC11b** Anything else?

» *No*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *You get billed if you don't cancel.*

**Q12c** Anything else?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *I don't specifically recall, but I bet there was an option to send a question, or do an online chat.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I may still look at some other websites, and I would also search for any information about Rocket Lawyer credibility. I still would be very hesitant to provide credit card information and if they were not willing to do the free trial without that info then I probably would not go with them. I get angry at sites that lead you down a long path after telling you that you're getting something for free, and then at the end ask for personal information and especially credit card information. Its a waste of my time.*

**Q13c** Anything else?

» *No*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *See last comment.*

**Q14b2** Any other reasons?

» *No*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Only would if they did not request credit card information.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Free Trial should not require credit card information*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 1*

» *Free Trial should not require credit card information 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *I do not recall, but I know I have seen some in the past.*

**Q15c** Anything else?

» *No*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *I don't know*

**Image Set**

» *BILL OF SALE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Illinois*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Estate planning*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

» *Family law*

» *Bill of Sale*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Spoke to a lawyer*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *AOL*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *esign option*

**Q3b** Anything else? *www.rocketlawyer.com*

» *not really*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *9.99 a month for 1 year*

**QC8** Anything else?

» *good offer*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *you entered your information... I think it was for 30 days*

**QC11a** How would you describe the free trial offer to a friend?

» *nice if you had the need for the service*

**QC11b** Anything else?

» *no*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *click the help button or google it*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *look into it further*

**Q13c** Anything else?

» *no*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Enroll in an annual plan (access to all forms and attorney services immediately for \$9.99 a month when prepaying for one year)*

**Q14b1** What made you decide to << insert >>?

» *ease of access when you need it*

**Q14b2** Any other reasons?

» *no*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *need service right away*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Brand name 2*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Customer reviews*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*



**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Illinois*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Estate planning*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *1 - Definitely will not*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *first listed*

**Q3b** Anything else? www.legalzoom.com

» *nope*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.lawdepot.com?

» *not first*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *not first*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *free for one week*

**QC8** Anything else?

» *very professional*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *one week*

**QC11a** How would you describe the free trial offer to a friend?

» *one week trail period*

**QC11b** Anything else?

» *nope*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *one week*

**Q12c** Anything else?

» *one week*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *look them up*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *try it*

**Q13c** Anything else?

» *nope*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *I want to test it*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *nope*

» *nope*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Recommendations from colleagues 3*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *newspaper sites*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 2418**

**Image Set**

» *INCORPORATION CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *Texas*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Temporarily unemployed*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.mycorporation.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *Sounded more professional than the others*

**Q3b** Anything else? www.legalzoom.com

» *It's not just about 'low price'*

**Q3a** Why did you select this company? www.mycorporation.com

» *Sounded a bit more 'professional'*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *Not interested in California*

**Q4b** Please tell us why you did not << initially >> select www.delawareinc.com?

» *I'm not about doing it 'fast'. I want to understand it and do it right.*

**QB5a** Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

» *Yes*

**QB5b** Thinking back to the Google search page, please tell us what you recall about the Rocket Lawyer ad.

» *only about 'fast and cheap'*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *Thought it was 'free'.*

**QB8** Anything else?

» *What's the \$90 for?*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *I don't know*

**QB10b2** Do you know if this state fee applies...

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *no idea*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *look at other websites*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *it's the way I do things*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *don't know*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 2*

» *Brand name 3*

» *Recommendations from colleagues 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *I don't know*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **Healthcare**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **65 or older**

**S5** Please indicate the state in which you reside.

» **Ohio**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Retired**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Estate planning**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Bing**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **the word legal caught my eye.**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» **www.totallegal.com**

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» **free is associated with the form not with any advice.**

**Q4b** Please tell us why you did not << initially >> select www.uniformpowerofattorney.com?

» *not free*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *I like to know the cost up front not afterwards.*

**QC8** Anything else?

» *I had a lot of questions and that process was not explained.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *free document and 10 days free trial.*

**QC11a** How would you describe the free trial offer to a friend?

» *sounds reasonable, but, what happened if you decline?*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *don't remember*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *calling a number or clicking on a advisory screen location*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *fill in all the information on the screen and enter your credit number*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *looking for free or cheaper*

**Q14b2** Any other reasons?

» *nothing about the document legal in my state*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *not enough specific information*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.



» *Price 1*

» *Customer reviews 2*

» *Personal experience on the website 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» *BILL OF SALE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

» *Healthcare*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *25-34*

**S5** Please indicate the state in which you reside.

» *Washington (state)*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Bill of Sale*

» *Landlord/tenant matters*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Bing*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *highlighted on top*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *electronic signature option in title and free*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *seems easy to fill out. Easy doesnt always mean better.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *at the end when the billing came up. 1 week free or other options of monthly and yearly.*

**QC11a** How would you describe the free trial offer to a friend?

» *give it a shot and just make sure you cancell if you dont want it so you dont get charged*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *1 week*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *call a number located at the bottom*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *ask someone who is a lawyer what their thoughts of websites like this*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Ask other people about the service*

**Q14b1** What made you decide to << insert >>?

» *to be sure and confident with online forms*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *i am always leary of free trials*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 3*

» *Brand name 1*

» *Recommendations from colleagues 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» Yes

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *energy supplements*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» Yes

**Image Set**

» **BILL OF SALE CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Michigan**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Executive**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

» **Family law**

» **Bill of Sale**

» **Estate planning**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **Yes**

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **Yes**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **5 - Definitely will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Incorporation/forming a business or organization**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I am or would be the primary decision maker**

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Yahoo*

» *Bing*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *I liked the name.*

**Q3b** Anything else? *www.legalcontracts.com*

» *I was quite credible.*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.buyerpricer.com*

» *www.rocketlawyer.com*

» *www.jsbusinessproducts.btobsorce.com*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *Sounds like a good company.*

**Q4b** Please tell us why you did not << initially >> select *www.jsbusinessproducts.btobsorce.com*?

» *It is worth a look, again based on the name.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It was very credible, asked the key questions for each of the areas of the document, it was very clear what I would enter.*

**QC8** Anything else?

» *The only issue I would have (given what has happened at Target and other identity theft) am I ready to give them my personal and cc info.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Oh. It was free, but I still had to enter my personal info.*

**QC11a** How would you describe the free trial offer to a friend?

» *It could be a good offer.*

**QC11b** Anything else?

» *The issue here for me is how long it is free. And am I going to actually get the one document I want in full. I don't recall seeing that. It may be there, but maybe not highlighted sufficiently.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *I usually assume that I can't ask anyone. I don't think I've ever followed up to get answers. Maybe I'm shy.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *The ease with which the site moved from page to page. The instructions were clear and easy to follow. I like that.*

**Q13c** Anything else?

» *No.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *I'm skeptical of all Internet companies, not just Rocket Lawyer. It might be a scam. The problem with emerging Internet companies is that they do not have a long history - will it be around tomorrow?*

**Q14b2** Any other reasons?

» *Too many horror stories in the news about scams.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *How long have they been in business?*

» *Customer testimonials.*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Recommendations from colleagues 1*

» *Personal experience on the website 2*

» *How long have they been in business? 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Wow - yeah tons. Vacation, health clubs, computer security, etc.*

**Q15c** Anything else?

» *No*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **INCORPORATION TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Ohio**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Owner/Proprietor**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

» **Family law**

» **Bill of Sale**

» **Estate planning**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Family law**

» **Estate planning**

» **Some Other type of legal service**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I am or would be the primary decision maker**

**S13a** Please tell us what kind of device you are taking this survey on.



» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.incorporate.com*

» *www.legalzoom.com*

» *www.rocketlawyer.com*

» *www.bizfilings.com*

» *www.incfree.com*

» *www.calfilings.com*

» *www.mycorporation.com*

**Q3a** Why did you select this company? *www.incorporate.com*

» *Provides needed service*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *Provides needed service*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *Free service*

**Q3a** Why did you select this company? *www.bizfilings.com*

» *Provides needed service*

**Q3a** Why did you select this company? *www.incfree.com*

» *Free*

**Q3a** Why did you select this company? *www.calfilings.com*

» *Provides needed service*

**Q3a** Why did you select this company? *www.mycorporation.com*

» *Provides needed service*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *Free. Provides all needed services.*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *No*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» **Yes**

**QB10b1** Do you know if this state fee applies...

» *I don't know*

**QB10b2** Do you know if this state fee applies...

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» **No**

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *toll free number*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *contact them*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *I don't know*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Don;t need service*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Customer reviews 2*

» *Brand name 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Don;t recall*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» **Yes**

**SURVEY 14-0603, CASE ID 2471**

**Image Set**

» *BILL OF SALE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *55-64*

**S5** Please indicate the state in which you reside.

» *North Carolina*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Self employed*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Incorporation/forming a business or organization*

» *Bill of Sale*

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I share or would share this responsibility with others*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.buyerpricer.com*

» *www.rocketlawyer.com*

» *www.officeconsultants.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *free*

**Q3a** Why did you select this company? *www.buyerpricer.com*

» *free*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *free*

**Q3a** Why did you select this company? *www.officeconsultants.com*

» *free*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *fill in the blank*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *?*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *not use it*

**Q13c** Anything else?

» *trail offer ends and there is a fee*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *fee*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *fee later*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Customer reviews 2*

» *Recommendations from colleagues 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15c** Anything else?

» *did not use*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» *DIVORCE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Nebraska*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Retired*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Some Other type of legal service*

**S10b** Please tell us the specific type of online legal service company or companies you have looked for online.

» *Legal forms regarding POA, etc of a deceased family member*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Other specify: ("Spoke to a bank")*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.lawdepot.com*

» *www.rocketlawyer.com*

» *www.uslegalforms.com*

**Q3a** Why did you select this company? www.lawdepot.com

» *I've used the law depot site before.*

**Q3b** Anything else? www.lawdepot.com

» *I'd find the form I need/want then look for it specifically on a legal site in my state.*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *I've used this site before.*

**Q3b** Anything else? www.rocketlawyer.com

» *You can view drafts for free but have to pay for documents to print.*

**Q3a** Why did you select this company? www.uslegalforms.com

» *Best site to find the NAME of specific documents.*

**Q3b** Anything else? www.uslegalforms.com

» *This site is not free. I just use it to find the form then I go to another site for more information or to print one.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *You can see the read only or draft copy of the document after inserting the most common information in the blanks.*

**QC8** Anything else?

» *This site is very user friendly. However, it is a PAY site, NOT a free site.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *It was a joke "free trial offer." It says you get one week free but you still have to put in your credit card information. No thanks.*

**QC11a** How would you describe the free trial offer to a friend?

» *Not really free.*

**QC11b** Anything else?

» *You have to put in your credit card information.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *Your credit card gets charged after one week.*

**Q12c** Anything else?

» *You get charged the higher fee not the "best deal" fee.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *They have a number to call or you can email them. I think they have an instant chat, too.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Find out if there are other requirements for MY state specific divorce.*

**Q13c** Anything else?

» *Look for other blank document sites that are free to print.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *Cost.*

**Q14b2** Any other reasons?

» *One week time limit.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *It wasn't really free. If it was they wouldn't need my credit card information.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Approved by courts in my state.*

» *State specific statutes.*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Approved by courts in my state. 3*

» *State specific statutes. 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Customer reviews*

» *Brand name*

» *Recommendations from colleagues*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Sprint cell phones. Direct TV. "Who's spying on you" website*

**Q15c** Anything else?

» *American Express Other credit card companies.*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*



**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Florida**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Intermediate level**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

» **Bing**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.lawdepot.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **I have heard about this company in the past**

**Q3b** Anything else? www.legalzoom.com

» **The forms are free**

**Q3a** Why did you select this company? www.lawdepot.com

» **The forms are free**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» **None**

**Q4b** Please tell us why you did not << initially >> select www.totallegal.com?

» *I am more comfortable with another site*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *I am more comfortable with another site*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *You can create a POA for free for 1 week. However, you have to pay upfront and then cancel or you will be charged a monthly fee*

**QC8** Anything else?

» *You have to sign up for a specific time frame in order to obtain the services*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Free for 1 week and you get to create a POA You have to pay upfront and remember to cancel before the week is over or you end up paying \$19.95 per month.*

**QC11a** How would you describe the free trial offer to a friend?

» *Bait and switch*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *You get charged \$19.95 per month until you cancel*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Don't know*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Use another site*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *Look for a site that is truly free for the forms that I want*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *I may not complete all the forms that I want in 1 week*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price* 3

» *Personal experience on the website* 2

» *Opportunity to try the service for free* 1

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Customer reviews*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *I don't remember*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Georgia*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *name recognition*

**Q3b** Anything else? www.legalzoom.com

» *no*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.totallegal.com?

» *no recognition*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *sounds cheezy*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» **Yes**

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *full coverage of legal needs*

**QC8** Anything else?

» *no*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» **Yes**

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *30 days*

**QC11a** How would you describe the free trial offer to a friend?

» *okay*

**QC11b** Anything else?

» *no*

**Q12a** Do you recall if the free trial offer has a time limit?

» **Yes**

**Q12c** What happens after the free trial period?

» *monthly cost*

**Q12c** Anything else?

» *no*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *ask*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *nothing*

**Q13c** Anything else?

» *no*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Other specify: ("use employer option")*

**Q14b1** What made you decide to << insert >>?

» *equal coverage, less cost*

**Q14b2** Any other reasons?

» *no*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *unsure*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Brand name 3*

» *Recommendations from colleagues 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *various*

**Q15c** Anything else?

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» **INCORPORATION TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Florida*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Owner/Proprietor*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.rocketlawyer.com*

» *www.incfiile.com*

» *www.incforfree.com*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *I KNOW THE NAME AND HAVE PURCHASED FROM THEM IN THE PAST*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *IT SAID FREE*

**Q3a** Why did you select this company? *www.incfiile.com*

» **THE COST WAS LOW**

**Q3a** Why did you select this company? [www.incforfree.com](http://www.incforfree.com)

» **IT SAID FREE**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» [www.smallbiz.com](http://www.smallbiz.com)

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» **Yes, I have reviewed this page (Page 1)**

» **Yes, I have reviewed this page (Page 2)**

» **Yes, I have reviewed this page (Page 3)**

» **Yes, I have reviewed this page (Page 4)**

» **Yes, I have reviewed this page (Page 5)**

» **Yes, I have reviewed this page (Page 6)**

» **Yes, I have reviewed this page (Page 7)**

» **Yes, I have reviewed this page (Page 8)**

» **Yes, I have reviewed this page (Page 9)**

» **Yes, I have reviewed this page (Page 10)**

» **Yes, I have reviewed this page (Page 11)**

» **Yes, I have reviewed this page (Page 12)**

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» **PAY STATE FILING FEES THE REST IS FREE**

**QB8** Anything else?

» **OPTIONAL TRIAL ON LEGAL SERVICES**

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» **Yes**

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» **Yes**

**QB10b1** Do you know if this state fee applies...

» **I don't know**

**QB10b2** Do you know if this state fee applies...

» **I don't know**

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» **Yes**

**Q12a** Do you recall if the free trial offer has a time limit?

» **No**

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» **CALL**

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» **LET ROCKET LAWYER PROCEED WITH THE APPLICATION WITH THE STATE**

**Q13c** Anything else?

» **THEY ASUMED MOST PEOPLE WOULD KNOW WHAT KIND OF LEGAL ENTITY THEY WANTED TO SET UP. SHOULD HAVE AN OPTION THAT EXPLAINS THE CHOICES. MOST PEOPLE DONT KNOW A SUBCHAPER S FROM AN LLC (TRICK QUESTION THEY CAN BE THE SAME)**

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» **Pay for incorporation services (without free trial - \$99.95)**

**Q14b1** What made you decide to << insert >>?



» **DO NOT NEED THE EXTRA SERVICES. ALSO I THINK IT HAD 2 DIFFERENT PRICES IN ONE PLACE 39.95 AND 59.95. ALSO IN ONE PLACE THE INCORPORATION SERVICES WAS 99.99 AND THE INVOICE AT THE END WAS 90**

**Q14c** Why did you not choose to take the free trial<< insert >>?

» **GOOD DEAL GOOD PRICE**

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» **No additional factors apply**

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» **Price 1**

» **Personal experience on the website 3**

» **Opportunity to try the service for free 2**

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» **Advertisement**

» **Brand name**

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» **ADOBE SOFTWARE QUICKBOOKS ONLINE AMAZON PRIME HULU PLUS**

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» **Yes**

**Image Set**

» **POWER OF ATTORNEY CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **55-64**

**S5** Please indicate the state in which you reside.

» **Texas**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Intermediate level**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Some Other type of legal service**

**S10b** Please tell us the specific type of online legal service company or companies you have looked for online.

» **Patent application**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

» **Some Other type of legal service**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.rocketlawyer.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **Heard good things about it - good pricing**

**Q3b** Anything else? www.legalzoom.com

» **not really**

**Q3a** Why did you select this company? www.rocketlawyer.com

» *Looked interesting*

**Q3b** Anything else? www.rocketlawyer.com

» *high up in the lisgt*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *nothing is free - trial offer is still \$20*

**QC8** Anything else?

» *lots of steps to power of attorney in california*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *19.95 is not free*

**QC11a** How would you describe the free trial offer to a friend?

» *not worth it*

**QC11b** Anything else?

» *don't like to be lead along like that*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *19.95*

**Q12c** Anything else?

» *auto payments*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *not sure*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *try legalzoom*

**Q13c** Anything else?

» *no*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Decide not to buy an online legal service*

**Q14b1** What made you decide to << insert >>?

» *not really free - you don't really get anything*

**Q14b2** Any other reasons?

» *no*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *not really free*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 3*

» *Recommendations from colleagues 2*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *auto payment needed*

**Q15c** Anything else?

» *nio*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**SURVEY 14-0603, CASE ID 2502**

**Image Set**

» **LEASE AGREEMENT CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **Maryland**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Executive**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Landlord/tenant matters**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Asked friends/family**

» **Asked colleagues**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalcontracts.com**

» **www.rocketlawyer.com**

» **www.lawdepot.com**

**Q3a** Why did you select this company? www.legalcontracts.com

» **name of company**

**Q3a** Why did you select this company? www.rocketlawyer.com

» **the statement "print forms in 5 minutes"**

**Q3a** Why did you select this company? www.lawdepot.com

» **the statement: "a residential/lease agreement..."**

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *had a trial offer*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *30 days*

**QC11a** How would you describe the free trial offer to a friend?

» *try it out for 30 days*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *choice of three plans*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *online*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *keep looking*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *to see what other options are out there*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *to see what other options are out there*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 1*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» **No**

**Image Set**

» *BILL OF SALE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *65 or older*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Owner/Proprietor*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Bill of Sale*

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Some Other type of legal service*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.buyerpricer.com*

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? www.buyerpricer.com

» *free, first in search*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *used before*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*



» Yes, I have reviewed this page (Page 2)

» Yes, I have reviewed this page (Page 3)

» Yes, I have reviewed this page (Page 4)

» Yes, I have reviewed this page (Page 5)

» Yes, I have reviewed this page (Page 6)

» Yes, I have reviewed this page (Page 7)

» Yes, I have reviewed this page (Page 8)

» Yes, I have reviewed this page (Page 9)

» Yes, I have reviewed this page (Page 10)

» Yes, I have reviewed this page (Page 11)

» Yes, I have reviewed this page (Page 12)

» Yes, I have reviewed this page (Page 13)

» Yes, I have reviewed this page (Page 14)

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *monthly fee, step by step*

**QC8** Anything else?

» *as trial membership*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» Yes

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *trial offer seemed ok*

**QC11a** How would you describe the free trial offer to a friend?

» *use one time*

**Q12a** Do you recall if the free trial offer has a time limit?

» Yes

**Q12c** What happens after the free trial period?

» *14 days*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *call*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *create own*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Decide not to buy an online legal service*

**Q14b1** What made you decide to << insert >>?

» *limited use*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *hassle to cancel*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 1*

» *Personal experience on the website 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» **Yes**

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *buying service*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» **No**

**SURVEY 14-0603, CASE ID 2510**

**Image Set**

» **LEASE AGREEMENT TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **65 or older**

**S5** Please indicate the state in which you reside.

» **Iowa**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Executive**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Bill of Sale**

» **Landlord/tenant matters**

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Landlord/tenant matters**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.rocketlawyer.com**

» **www.ezlandlordforms.com**

» *www.totallegal.com*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *Free*

**Q3b** Anything else? *www.rocketlawyer.com*

» *Print Forms*

**Q3a** Why did you select this company? *www.ezlandlorrdforms.com*

» *Free*

**Q3a** Why did you select this company? *www.totallegal.com*

» *Free*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Can Be Free*

**QC8** Anything else?

» *Also can have charges*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *was not interested*

**QC11a** How would you describe the free trial offer to a friend?

» *could not*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *not sure*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *do not know*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Check other sites*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *Do not like sites that offer free, but then try and switch you.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Do not trust it is really free, and may not be able to stop the service when the free trial is over.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 2*

» *Recommendations from colleagues 3*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Avast*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **California**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Intermediate level**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Asked friends/family**

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» **Yes**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.lawdepot.com**

» **www.totallegal.com**

» **www.rocketlawyer.com**

» **www.uniformpowerofattorney.com**

**Q3a** Why did you select this company? **www.legalzoom.com**

» **Informational**

**Q3b** Anything else? **www.legalzoom.com**

» **no**

**Q3a** Why did you select this company? **www.lawdepot.com**

» **Free forms**

**Q3b** Anything else? www.lawdepot.com

» *Questions answered*

**Q3a** Why did you select this company? www.totallegal.com

» *Forms for every state*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *Free, can print in 5 minutes*

**Q3a** Why did you select this company? www.uniformpowerofattorney.com

» *Immediate downloads*

**Q3b** Anything else? www.uniformpowerofattorney.com

» *No hidden fees.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *It is convenient to get the info. you need. Free trial basis.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *1 month free*

**QC11a** How would you describe the free trial offer to a friend?

» *1 month free service*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Call the number.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Download it.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Ask other people about the service*

**Q14b1** What made you decide to << insert >>?

» *I like to see reviews online.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *See if it's for me.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *none*

» *none*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price* 1

» *Recommendations from colleagues* 2

» *Opportunity to try the service for free* 3

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*



**Image Set**

» ***INCORPORATION CONTROL***

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» ***None of the above***

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» ***None of the above***

**S3** Please record your gender below.

» ***Male***

**S4** Which of the following categories includes your age?

» ***35-44***

**S5** Please indicate the state in which you reside.

» ***Georgia***

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» ***I Agree***

**S7** Which of the following best describes your employment status?

» ***Employed full-time***

**S8a** Which of the following best describes your position with your company?

» ***Intermediate level***

**S8b** Do you have any aspirations or plans to start your own company/business?

» ***Yes***

**S9** Over the past few years, have you looked on the internet for online legal services?

» ***Yes***

**S10a** What specific legal services have you looked for online?

» ***Incorporation/forming a business or organization***

» ***Bill of Sale***

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» ***No***

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» ***No***

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» ***4 - Probably will***

**S11b** Specifically, what types of online legal services will you be looking for?

» ***Incorporation/forming a business or organization***

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» ***I am or would be the primary decision maker***

**S13a** Please tell us what kind of device you are taking this survey on.

» ***Computer or Laptop***

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» ***Used an internet search engine***

**Q1b** Which search engine did you use to look for online legal services?

» ***Google***

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» [www.incorporate.com](http://www.incorporate.com)

» [www.legalzoom.com](http://www.legalzoom.com)

» [www.calfilings.com](http://www.calfilings.com)

**Q3a** Why did you select this company? [www.incorporate.com](http://www.incorporate.com)

» *The name, incorporate.com*

**Q3b** Anything else? [www.incorporate.com](http://www.incorporate.com)

» *incorporate in any state.*

**Q3a** Why did you select this company? [www.legalzoom.com](http://www.legalzoom.com)

» *Hears lots of good stuff about this site.*

**Q3a** Why did you select this company? [www.calfilings.com](http://www.calfilings.com)

» *35+ years in the business.*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select [www.rocketlawyer.com](http://www.rocketlawyer.com)?

» *california*

**Q4b** Please tell us why you did not << initially >> select [www.smallbiz.com](http://www.smallbiz.com)?

» *california*

**QB5a** Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

» *I don't know*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *Cheap and it does everything for you.*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *No*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *email or call.*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *might consider them.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Ask other people about the service*

**Q14b1** What made you decide to << insert >>?

» *Want to see reviews on how good their service is.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Don't want to waste my time if they don't do a good job.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Customer reviews 2*

» *Recommendations from colleagues 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *amazon prime*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **INCORPORATION TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None, I haven't taken a market research survey in the past 3 months**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **35-44**

**S5** Please indicate the state in which you reside.

» **Massachusetts**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **Yes**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Incorporation/forming a business or organization**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I am or would be the primary decision maker**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.incorporate.com**

» **www.legalzoom.com**

» **www.rocketlawyer.com**

» [www.bizfilings.com](http://www.bizfilings.com)

» [www.incfiile.com](http://www.incfiile.com)

**Q3a** Why did you select this company? [www.incorporate.com](http://www.incorporate.com)

» xxx

**Q3a** Why did you select this company? [www.legalzoom.com](http://www.legalzoom.com)

» xxx

**Q3a** Why did you select this company? [www.rocketlawyer.com](http://www.rocketlawyer.com)

» xxx

**Q3a** Why did you select this company? [www.bizfilings.com](http://www.bizfilings.com)

» xxx

**Q3a** Why did you select this company? [www.incfiile.com](http://www.incfiile.com)

» xxx

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» [www.incforfree.com](http://www.incforfree.com)

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» Yes, I have reviewed this page (Page 1)

» Yes, I have reviewed this page (Page 2)

» Yes, I have reviewed this page (Page 3)

» Yes, I have reviewed this page (Page 4)

» Yes, I have reviewed this page (Page 5)

» Yes, I have reviewed this page (Page 6)

» Yes, I have reviewed this page (Page 7)

» Yes, I have reviewed this page (Page 8)

» Yes, I have reviewed this page (Page 9)

» Yes, I have reviewed this page (Page 10)

» Yes, I have reviewed this page (Page 11)

» Yes, I have reviewed this page (Page 12)

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» good

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» Yes

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» Yes

**QB10b1** Do you know if this state fee applies...

» ...only if you mail in your incorporation papers

**QB10b2** Do you know if this state fee applies...

» ...only if you incorporate through this particular online legal services company

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» Yes

**Q12a** Do you recall if the free trial offer has a time limit?

» Yes

**Q12c** What happens after the free trial period?

» 30

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» xxx

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» take it

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes free processing)*

**Q14b1** What made you decide to << insert >>?

» *good*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *xxx*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 1*

» *Recommendations from colleagues 2*

» *Personal experience on the website 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**SURVEY 14-0603, CASE ID 2570**

**Image Set**

» **INCORPORATION CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None, I haven't taken a market research survey in the past 3 months**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **Ohio**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Upper Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

» **Landlord/tenant matters**

» **Some Other type of legal service**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **5 - Definitely will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Family law**

» **Some Other type of legal service**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I am or would be the primary decision maker**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Asked friends/family**

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Bing*

» *Ask*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.mycorporation.com*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *it would be free*

**Q3b** Anything else? *www.legalzoom.com*

» *na*

**Q3a** Why did you select this company? *www.mycorporation.com*

» *na*

**Q3b** Anything else? *www.mycorporation.com*

» *na*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select *www.incorporate.com*?

» *not sure*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *only good for california*

**QB5a** Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

» *No*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *it cost 90 dollars and it lets you do everything on one site,na*

**QB8** Anything else?

» *na*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *No*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?



» **Yes**

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *go on line or call the 800 number*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *na*

**Q13c** Anything else?

» *na*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Ask other people about the service*

**Q14b1** What made you decide to << insert >>?

» *just to check it out*

**Q14b2** Any other reasons?

» *na*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *not sure*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Advertisement 3*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **Food Brands or Products**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **California**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Retired**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Estate planning**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.lawdepot.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **High on search engine. 697 followers on Google+.**

**Q3b** Anything else? www.legalzoom.com

» **The words "legal" and "zoom" together caught my attention.**

**Q3a** Why did you select this company? www.lawdepot.com

» **High on search engine. "Free"....Answer simple questions....Get immediate results....Lawyer Drafted**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.totallegal.com*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *I did not select because of the name "rocket lawyer" which I found unappealing and a sort of braggart.*

**Q4b** Please tell us why you did not << initially >> select www.uniformpowerofattorney.com?

» *Primarily due to its name and length.*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *First week is free. Payment information is required for uninterrupted service; however, you may cancel service by the first week. Any documents obtained during your trial are free and can be accessed online as well. e-signature Pro Service is pre-paid. Unlimited documents. Allows review of legal documents by local attorney. Monthly plan is \$17.?? Unlimited documents. Review of legal documents by an attorney after 90 days.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *First week is free. Pre payment required. Unlimited documents are yours free for the first week should you cancel and may be accessed online. Cancelation can be obtained online by changing to "cancel" during the first week.*

**QC11a** How would you describe the free trial offer to a friend?

» *First week is free. No obligation. Simply cancel during the first week and all documents you obtain are yours to keep.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *Your credit card will be charged after 7 days. Monthly or Pro Service (one time annual charge)*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Chat online; Call Toll Free*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would try the Free Service knowing there is no obligation.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *I like to be uncommitted before enrollment in such a service so I can review the quality, etc.....*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Major Publications: Wall Street Journal, NY Times, etc.*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Opportunity to try the service for free 2*

» *Major Publications: Wall Street Journal, NY Times, etc. 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

» *Personal experience on the website*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Amazon Prime Netflix Hulu*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **65 or older**

**S5** Please indicate the state in which you reside.

» **Virginia**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.totallegal.com**

**Q3a** Why did you select this company? www.totallegal.com

» **Wasn't listed as an advertisement.**

**Q3b** Anything else? www.totallegal.com

» **No**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» **www.lawdepot.com**

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» **The name**

**Q4b** Please tell us why you did not << initially >> select www.uniformpowerofattorney.com?

» **Didn't say free**

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» **Yes**

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» **Yes, I have reviewed this page (Page 1)**

» **Yes, I have reviewed this page (Page 2)**

» **Yes, I have reviewed this page (Page 3)**

» **Yes, I have reviewed this page (Page 4)**

» **Yes, I have reviewed this page (Page 5)**

» **Yes, I have reviewed this page (Page 6)**

» **Yes, I have reviewed this page (Page 7)**

» **Yes, I have reviewed this page (Page 8)**

» **Yes, I have reviewed this page (Page 9)**

» **Yes, I have reviewed this page (Page 10)**

» **Yes, I have reviewed this page (Page 11)**

» **Yes, I have reviewed this page (Page 12)**

» **Yes, I have reviewed this page (Page 13)**

» **Yes, I have reviewed this page (Page 14)**

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» **You have to give your credit card information for a free trial. Not a good sign.**

**QC8** Anything else?

» **Nope!**

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» **Yes**

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» **One week, one document, give them your credit card number.**

**QC11a** How would you describe the free trial offer to a friend?

» **Don't do it!**

**QC11b** Anything else?

» **Nope**

**Q12a** Do you recall if the free trial offer has a time limit?

» **Yes**

**Q12c** What happens after the free trial period?

» **One week.**

**Q12c** Anything else?

» **Nope**

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» **Online chat**

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» **Go to another site and evaluate it.**

**Q13c** Anything else?

» **Nope**

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» **Continue searching on other online legal service sites**

**Q14b1** What made you decide to << insert >>?

» **There has to be a better deal out there someplace.**

**Q14b2** Any other reasons?

» **Nope**

**Q14c** Why did you not choose to take the free trial<< insert >>?

» **Because I have to give them my credit card info.**

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *restrictions on site*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 3*

» *Opportunity to try the service for free 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Ancestry sites Military History sites eBook sites*

**Q15c** Anything else?

» *Nope*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 2591**

**Image Set**

» **POWER OF ATTORNEY TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **65 or older**

**S5** Please indicate the state in which you reside.

» **Minnesota**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Middle Management**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **4 - Probably will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.lawdepot.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **Has legal in the name**

**Q3b** Anything else? www.legalzoom.com

» **no**

**Q3a** Why did you select this company? www.lawdepot.com

» **Advertises free - has some explanation of form**

**Q3b** Anything else? www.lawdepot.com

» **no**

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?



» *None*

**Q4b** Please tell us why you did not << initially >> select www.totallegal.com?

» *No explanation, idea of cost*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *Don't like/trust the name - rocket lawyer*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Free for one form, other options for enrollment*

**QC8** Anything else?

» *Step by step questions to help complete form*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *One form free*

**QC11a** How would you describe the free trial offer to a friend?

» *Get your power of attorney form completed free on-line.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Call or email*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Complete the form and enroll for the trial period*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *Don't want to be tied into a contract - might not need legal services again for some time*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *Easy directions*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Opportunity to try the service for free 1*

» *Easy directions 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Customer reviews*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» *LEASE AGREEMENT TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

» *Healthcare*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *South Carolina*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed part-time*

**S8a** Which of the following best describes your position with your company?

» *Some other level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Landlord/tenant matters*

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Landlord/tenant matters*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.rocketlawyer.com*

**Q3a** Why did you select this company? www.legalcontracts.com

» *FREE*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *Forms in 5 minutes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Free trial, otherwise a charge*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *for one time*

**QC11a** How would you describe the free trial offer to a friend?

» *not much*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *pay*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *agent*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *print and use*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Decide not to buy an online legal service*

**Q14b1** What made you decide to << insert >>?

» *can't afford*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *just needed one service*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Personal experience on the website 3*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

» *Customer reviews*

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *games*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» *BILL OF SALE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *North Dakota*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Bill of Sale*

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Bill of Sale*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *first listed*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.buyerpricer.com*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *name*

**Q4b** Please tell us why you did not << initially >> select www.jsbusinessproducts.btobsorce.com?

» *name*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *free trial*

**QC8** Anything else?

» *documents for sale of property*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *one month*

**QC11a** How would you describe the free trial offer to a friend?

» *good deal*

**QC11b** Anything else?

» *try it*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *website*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *check website*

**Q13c** Anything else?

» *activate free trial*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Enroll in a monthly plan (access to all forms and help from attorneys for \$17.95 per month, includes attorney review of forms after 90 days)*

**Q14b1** What made you decide to << insert >>?

» *only need it for that long*

**Q14b2** Any other reasons?

» *want to try it*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *too short*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *impression*

» *order listed on yahoo*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Advertisement 2*

» *Customer reviews 3*

» *impression 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Recommendations from colleagues*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *aol*

**Q15c** Anything else?

» *netflix*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*



**SURVEY 14-0603, CASE ID 2608**

**Image Set**

» *BILL OF SALE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Arkansas*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Intermediate level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Bill of Sale*

» *Landlord/tenant matters*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *Yes*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Family law*

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *iPad or Tablet*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.buyerpricer.com*

» *www.officeconsultants.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *It said free and was shaded at the top of the list.*

**Q3b** Anything else? *www.legalcontracts.com*

» *No. It just stood out.*

**Q3a** Why did you select this company? *www.buyerpricer.com*

» *It said free.*

**Q3b** Anything else? *www.buyerpricer.com*

» *No.*

**Q3a** Why did you select this company? *www.officeconsultants.com*

» *It was free.*

**Q3b** Anything else? *www.officeconsultants.com*

» *Office consultants sounds knowledgeable.*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.rocketlawyer.com*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *I've looked at their site before.*

**Q4b** Please tell us why you did not << initially >> select *www.jsbusinessproducts.btobsources.com*?

» *I don't like their web address.*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Free for one week and then your credit card is automatically billed.*

**QC8** Anything else?

» *It asked for all the info needed on a bill of sale.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *Free for 1 week then they bill your credit card.*

**QC11a** How would you describe the free trial offer to a friend?

» *Free for 1 wk then they bill your cc.*

**QC11b** Anything else?

» *No.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *They bill your cc.*

**Q12c** Anything else?

» *You have to enter a cc.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *There was a link.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Find it free somewhere else.*

**Q13c** Anything else?

» *No.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *I dont want to pay for it.*

**Q14b2** Any other reasons?

» *Dont want to enter my cc.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *They wanted my cc.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *accuracy of legal document*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Customer reviews 3*

» *accuracy of legal document 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Do jotvrecall*

**Q15c** Anything else?

» *No*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 2632**

**Image Set**

» *DIVORCE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Texas*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Intermediate level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Family law*

» *Landlord/tenant matters*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *2 - Probably will not*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.completecase.com*

**Q3a** Why did you select this company? *www.completecase.com*

» *like the featured on famous sites*

**Q3b** Anything else? *www.completecase.com*

» *no*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.rocketlawyer.com*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *advice free interesting, but free is too cheap for important law stuff.*

**Q4b** Please tell us why you did not << initially >> select *www.uslegalforms.com*?

» *little info under topic*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *the form interview was easy step by step.*

**QC8** Anything else?

» *didn't like the prepaid stuff. would rather pay for the service one time.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *it was free for like a month. I am not a big fan of prepaid legal and didn't know until the end of the survey.*

**QC11a** How would you describe the free trial offer to a friend?

» *did not notice could offer a friend.*

**QC11b** Anything else?

» *no. I don't like prepaid legal. I don't want to hook my friend up for something like this*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *one month.*

**Q12c** Anything else?

» *no. don't like the concept of trial.*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *online chat?*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *like the form a lot.*

**Q13c** Anything else?

» *don't like prepaid legal and didn't know that was leading to at the end.*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Decide not to buy an online legal service*

**Q14b1** What made you decide to << insert >>?

» *it seems like a pyramid scheme like people try to get you to sign up for in the past.*

**Q14b2** Any other reasons?

» *not going to do anything prepaid. just straight forward billing.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *seemed like old prepaid legal people trying to sell a few years back*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *customer reviews*

» *recommendations from colleagues*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 1*

» *Brand name 2*

» *Recommendations from colleagues 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» *BILL OF SALE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None, I haven't taken a market research survey in the past 3 months*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *Connecticut*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Intermediate level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Bill of Sale*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Didn't have to --- I already knew of a name and just went directly to the site*

**Q1c** Have you considered using Google or other search engines to look for online legal services?

» *Yes*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.jsbusinessproducts.btobsource.com*

**Q3a** Why did you select this company? www.jsbusinessproducts.btobsource.com

» *good ad*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.buyerpricer.com?

» *none*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *none*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *x*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *x*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *x*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *I don't know*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *i do not like free trial*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 2*

» *Advertisement 1*

» *Personal experience on the website 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*



**SURVEY 14-0603, CASE ID 2643**

**Image Set**

» **LEASE AGREEMENT CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None, I haven't taken a market research survey in the past 3 months**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **Rhode Island**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Owner/Proprietor**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Family law**

» **Some Other type of legal service**

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» **Yes**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **5 - Definitely will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Landlord/tenant matters**

» **Estate planning**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.rocketlawyer.com**

» **www.totallegal.com**

**Q3a** Why did you select this company? www.rocketlawyer.com

» **n/a**

**Q3b** Anything else? www.rocketlawyer.com

» **n/a**

**Q3a** Why did you select this company? www.totallegal.com

» *n/a*

**Q3b** Anything else? www.totallegal.com

» *n/a*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *n/a*

**QC8** Anything else?

» *n/a*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *n/a*

**QC11a** How would you describe the free trial offer to a friend?

» *n/a*

**QC11b** Anything else?

» *n/a*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *fees*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *online*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *order forms*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *I don't know*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *n/a*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 2*

» *Personal experience on the website 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Brand name*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» **INCORPORATION CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **Technology**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **Ohio**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Self employed**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

» **Some Other type of legal service**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **3 - May or may not**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Incorporation/forming a business or organization**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I am or would be the primary decision maker**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.legalzoom.com**

» **www.rocketlawyer.com**

**Q3a** Why did you select this company? www.legalzoom.com

» **I have heard of the LegalZoom name before.**

**Q3b** Anything else? www.legalzoom.com

» *n/a*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *I have used RocketLawyer in the past.*

**Q3b** Anything else? www.rocketlawyer.com

» *N/A*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.mycorporation.com*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *I like that you had a number you could call at any time.*

**QB8** Anything else?

» *I was a little confused as to if it was free or if I only need to sign up for the free trial period.*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *...to all businesses that you want to incorporate regardless of how you chose to file your incorporation papers*

**QB10b2** Do you know if this state fee applies...

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *It was for one week, but I can not remember what happens after the week.*

**Q12c** Anything else?

» *n/a*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *call the number listed*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *The references seemed good and was endorsed by the Wall Street Journal, so I think I would use the site.*

**Q13c** Anything else?

» *n/a*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes free processing)*

**Q14b1** What made you decide to << insert >>?

» *I am cheap.*

**Q14b2** Any other reasons?

» *I did not see the advantage of joining.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Customer reviews 2*

» *Recommendations from colleagues 1*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *NetGear*

**Q15c** Anything else?

» *n/a*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**Image Set**

» *INCORPORATION CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Food Brands or Products*

» *Technology*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Alaska*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Upper Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalzoom.com*

» *www.rocketlawyer.com*

» *www.incfile.com*

**Q3a** Why did you select this company? www.legalzoom.com

» *commercials with famous lawyer*

**Q3a** Why did you select this company? www.rocketlawyer.com

» *Commercials with famous lawyer*

**Q3a** Why did you select this company? [www.incfile.com](http://www.incfile.com)

» *cheap price*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.mycorporation.com*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *cost 90.00*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *I don't know*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *call 800 number*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *still research other websites*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *want to compare different sites and services*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *don't like free trails...always end up being some sort of "membership" thing*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 3*

» *Brand name 2*

» *Recommendations from colleagues 1*



**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *no*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**SURVEY 14-0603, CASE ID 2676**

**Image Set**

» *DIVORCE TEST*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *35-44*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Family law*

» *Landlord/tenant matters*

» *Estate planning*

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» *No*

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Estate planning*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Asked colleagues*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.rocketlawyer.com*

» *www.uslegalforms.com*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *heard/stumble or seen them before*

**Q3b** Anything else? *www.rocketlawyer.com*

» *appears to be legit*

**Q3a** Why did you select this company? *www.uslegalforms.com*

» *appears to be legit*

**Q3b** Anything else? *www.uslegalforms.com*

» *seems easy*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *easy to follow and good pricing option*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *free one document as trial offer*

**QC11a** How would you describe the free trial offer to a friend?

» *worth a try for do it yourself*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *can't recall try contact help desk*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *consider them if I need one*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *open to see what's best option out there*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *don't want to join if not yet sure*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Customer reviews 3*

» *Personal experience on the website 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**SURVEY 14-0603, CASE ID 2701**

**Image Set**

» **LEASE AGREEMENT CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None of the above**

**S3** Please record your gender below.

» **Male**

**S4** Which of the following categories includes your age?

» **18-24**

**S5** Please indicate the state in which you reside.

» **Missouri**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Entry Level**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **No**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Landlord/tenant matters**

» **Estate planning**

**S10c** Did you actually purchase online legal services for Landlord/tenant matters from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Estate planning from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **2 - Probably will not**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

**Q1b** Which search engine did you use to look for online legal services?

» **Google**

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» **www.biztree.com**

» **www.lawdepot.com**

**Q3a** Why did you select this company? www.biztree.com

» **Company seemed easy to use based on the name.**

**Q3b** Anything else? www.biztree.com

» *Company was not listed at the top of the page so they did not pay Google to increase their advertising.*

**Q3a** Why did you select this company? www.lawdepot.com

» *Title was very specific to my geographic area (United States). I know this information would be relevant to me.*

**Q3b** Anything else? www.lawdepot.com

» *Nothing*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.legalcontracts.com?

» *I slightly distrust sponsored ads on Google.*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *The name "rocketlawyer" is not appealing and seems sketchy.*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Free 1 week trial which will allow you to create any legal documents. After that there is a monthly fee.*

**QC8** Anything else?

» *There are higher membership levels that include review of legal documents and other help.*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *1 week free during which you can create whatever documents you want.*

**QC11a** How would you describe the free trial offer to a friend?

» *It is a one week free trial in which you can create your legal documents. After the free trial ends you will be charged a monthly fee until you cancel.*

**QC11b** Anything else?

» *Make sure you get all your documents done during the free trial.*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *Your credit card will be charged the monthly fee.*

**Q12c** Anything else?

» *I believe the fee was \$19.99*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *There is a chat, email, or phone number.*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *I would consider giving Rocket Lawyer a try. However, I would also look for other services that did not require a credit card up front.*

**Q13c** Anything else?

» *No*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *I like to weigh all my options before purchasing a product. I also like independent reviews of any website that I give my credit card to.*

**Q14b2** Any other reasons?

» *I do not like signing up for free trials that will automatically charge you if you forget to cancel the service before the end of the trial period.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *I did not want to provide a credit card and be charged automatically at the end of the trial period.*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 3*

» *Recommendations from colleagues 1*

» *Personal experience on the website 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *Experian TransUnion Red Box Netflix Hulu Plus*

**Q15c** Anything else?

» *No*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *Yes*

**SURVEY 14-0603, CASE ID 2721**

**Image Set**

» *BILL OF SALE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *25-34*

**S5** Please indicate the state in which you reside.

» *Pennsylvania*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *Yes*

**S10a** What specific legal services have you looked for online?

» *Bill of Sale*

**S10c** Did you actually purchase online legal services for Bill of Sale from one of these online legal companies you were looking at?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Bill of Sale*

**S13a** Please tell us what kind of device you are taking this survey on.

» *iPad or Tablet*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.jsbusinessproducts.btobsource.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *Looks reliable, free*

**Q3a** Why did you select this company? *www.jsbusinessproducts.btobsource.com*

» *Looks more reliable, free*



**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *Looks unreliable*

**Q4b** Please tell us why you did not << initially >> select www.officeconsultants.com?

» *Looks unreliable*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *You have to sign up*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *You can get a read only version for free*

**QC11a** How would you describe the free trial offer to a friend?

» *Have to sign up or get read only version*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *1week*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *Idk*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Get read only version*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *It's free*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Brand name 3*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Personal experience on the website*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**Image Set**

» *BILL OF SALE CONTROL*

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *Illinois*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed part-time*

**S8a** Which of the following best describes your position with your company?

» *Intermediate level*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *No*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

» *Bill of Sale*

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I share or would share this responsibility with others*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Spoke to a lawyer*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.jsbusinessproducts.btobsource.com*

**Q3a** Why did you select this company? www.jsbusinessproducts.btobsource.com

» *seem more credible*

**Q3b** Anything else? www.jsbusinessproducts.btobsource.com

» *no*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.officeconsultants.com*

**Q4b** Please tell us why you did not << initially >> select *www.legalcontracts.com*?

» *preferred other name*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *do not like the rocketlawyer seems phony*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *Seems easy to use. Carefully put together, and seems all encompassing.*

**QC8** Anything else?

» *Thorough*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *Yes*

**QC10** What was their free trial offer? Please list all the details about this offer that you can recall.

» *free for 1 month*

**QC11a** How would you describe the free trial offer to a friend?

» *Fre access to service for one month*

**Q12a** Do you recall if the free trial offer has a time limit?

» *Yes*

**Q12c** What happens after the free trial period?

» *1 month*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *e mail*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Seriously consider using Rocket Lawyer*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Other specify: ("look inot it when i need services")*

**Q14b1** What made you decide to << insert >>?

» *I do not currently have a sale to write up.*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *Not needed today*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *worry about something be left off of a contract*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Customer reviews 2*

» *Recommendations from colleagues 1*

» *Opportunity to try the service for free 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Advertisement*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *Yes*

**Q15b** Do you recall some of the businesses that offered these free trials? Please list them.

» *most do... e cards, games, netflix, redbox, o e books...*

**Q15d** Did you ever decide to enroll in any free trial programs that were offered?

» *No*

**Image Set**

» **INCORPORATION CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *Technology*

**S3** Please record your gender below.

» *Male*

**S4** Which of the following categories includes your age?

» *45-54*

**S5** Please indicate the state in which you reside.

» *California*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Employed full-time*

**S8a** Which of the following best describes your position with your company?

» *Middle Management*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *3 - May or may not*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I am or would be the primary decision maker*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

**Q1b** Which search engine did you use to look for online legal services?

» *Yahoo*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.incfiling.com*

**Q3a** Why did you select this company? www.incfiling.com

» *cheap*

**Q3b** Anything else? www.incfiling.com

» *no*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *www.bizfilings.com*

**Q4b** Please tell us why you did not << initially >> select www.legalzoom.com?

» *zoom?*

**Q4b** Please tell us why you did not << initially >> select www.rocketlawyer.com?

» *weird*

**QB5a** Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

» *Yes*

**QB5b** Thinking back to the Google search page, please tell us what you recall about the Rocket Lawyer ad.

» *not much*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *good*

**QB8** Anything else?

» *no*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *Yes*

**QB10a** Now reflecting on the Google ad and the Rocket Lawyer website, do you recall if you had to pay state fees to the state for Incorporation with the free trial offer?

» *Yes*

**QB10b1** Do you know if this state fee applies...

» *...to all businesses that you want to incorporate regardless of how you chose to file your incorporation papers*

**QB10b2** Do you know if this state fee applies...

» *...if you incorporate through any online legal services company*

**QB11** Reflecting back on the Rocket Lawyer website you viewed, do you recall a free trial offer?

» *Yes*

**Q12a** Do you recall if the free trial offer has a time limit?

» *No*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *idk*

**QB13b** Assuming you were interested in online legal services for Incorporation, and now that you have reviewed the Google ad and have gone through the Rocket Lawyer website, what are you likely to do?

» *nothing*

**Q13c** Anything else?

» *no*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Continue searching on other online legal service sites*

**Q14b1** What made you decide to << insert >>?

» *idk*

**Q14b2** Any other reasons?

» *no*

**Q14c** Why did you not choose to take the free trial<< insert >>?

» *idk*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Customer reviews 2*

» *Recommendations from colleagues 3*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Opportunity to try the service for free*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*



**SURVEY 14-0603, CASE ID 2745**

**Image Set**

» **LEASE AGREEMENT TEST**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» **None of the above**

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» **None, I haven't taken a market research survey in the past 3 months**

**S3** Please record your gender below.

» **Female**

**S4** Which of the following categories includes your age?

» **45-54**

**S5** Please indicate the state in which you reside.

» **California**

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» **I Agree**

**S7** Which of the following best describes your employment status?

» **Employed full-time**

**S8a** Which of the following best describes your position with your company?

» **Executive**

**S8b** Do you have any aspirations or plans to start your own company/business?

» **Yes**

**S9** Over the past few years, have you looked on the internet for online legal services?

» **Yes**

**S10a** What specific legal services have you looked for online?

» **Incorporation/forming a business or organization**

» **Family law**

**S10c** Did you actually purchase online legal services for Incorporation/forming a business or organization from one of these online legal companies you were looking at?

» **No**

**S10c** Did you actually purchase online legal services for Family law from one of these online legal companies you were looking at?

» **No**

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» **5 - Definitely will**

**S11b** Specifically, what types of online legal services will you be looking for?

» **Incorporation/forming a business or organization**

» **Family law**

» **Landlord/tenant matters**

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» **I am or would be the primary decision maker**

**S13a** Please tell us what kind of device you are taking this survey on.

» **Computer or Laptop**

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» **Used an internet search engine**

» **Asked colleagues**

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Ask*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.legalcontracts.com*

» *www.rocketlawyer.com*

» *www.totallegal.com*

» *www.lawdepot.com*

**Q3a** Why did you select this company? *www.legalcontracts.com*

» *The word free*

**Q3b** Anything else? *www.legalcontracts.com*

» *It pertained to what I am interested in*

**Q3a** Why did you select this company? *www.rocketlawyer.com*

» *Because I'm able to print out the forms in very few minutes*

**Q3b** Anything else? *www.rocketlawyer.com*

» *It has the word lawyer in the link*

**Q3a** Why did you select this company? *www.totallegal.com*

» *Because it indicates the words total legal*

**Q3b** Anything else? *www.totallegal.com*

» *Also, because it has forms for every state*

**Q3a** Why did you select this company? *www.lawdepot.com*

» *Because of the word law in the website*

**Q3b** Anything else? *www.lawdepot.com*

» *Because of the type of forms I need*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

» *Yes, I have reviewed this page (Page 13)*

» *Yes, I have reviewed this page (Page 14)*

**QC7** Now reflecting on the Rocket Lawyer website you reviewed, what can you tell me about Rocket Lawyer's offer?

» *They had several legal forms that I would need for my business*

**QC8** Anything else?

» *N/A*

**QC9a** You may have already mentioned this, but did the Rocket Lawyer website you reviewed include a free trial offer?

» *I don't know*

**Q12a** Do you recall if the free trial offer has a time limit?

» *I don't know*

**Q13a** If you sign up for the free trial offer and have any questions, how can you go about getting answers?

» *I would go on the website again to find them*

**QC13b** Assuming you were interested in online legal services for a << insert >> form, now that you have gone through the Rocket Lawyer website, what are you likely to do?

» *Sign up*

**Q13c** Anything else?

» *Print out the forms*

**Q14a** Which if any of the following options best describe what you are likely to do after having seen << insert >>?

» *Take the free trial (includes access to all Rocket Lawyer forms)*

**Q14b1** What made you decide to << insert >>?

» *I like to try things out first to see if it works for me*

**Q14b2** Any other reasons?

» *To see all the forms they have available*

**Q14d** Below are some factors that may be relevant to whether you will decide to use an online legal services company. Please review the list and add any factors that are relevant to you that may be missing. << insert factors >>

» *No additional factors apply*

**Q14e** Out of the list below, please rank the three most important factors that affect whether you will use an online legal services company, with 1 being the most important, 2 being the second most important and 3 being the third most important.

» *Price 1*

» *Customer reviews 3*

» *Opportunity to try the service for free 2*

**Q14f** Out of the remaining factors, please select any factors that are not important to you in deciding whether to use an online legal services company.

» *Personal experience on the website*

**Q15a** Finally, other than today, have you ever encountered any online offers for a free trial of products and/or services?

» *No*

**SURVEY 14-0603, CASE ID 2750**

**Image Set**

» **INCORPORATION CONTROL**

**S1** Do you or does anyone else in your household work for any of the following types of companies?

» *None of the above*

**S2a** In the past three months have you taken part in any of the following types of market research surveys?

» *None of the above*

**S3** Please record your gender below.

» *Female*

**S4** Which of the following categories includes your age?

» *25-34*

**S5** Please indicate the state in which you reside.

» *Indiana*

**S6** Before you continue, please read the following confidentiality and non-disclosure statement and answer the question that follows. I recognize and fully understand that the survey content is of confidential nature. Therefore, I agree that both during and after the study, I will not disclose any of the information discussed in the interview. Also, I will not identify the nature of the product in this survey. Do you agree or disagree?

» *I Agree*

**S7** Which of the following best describes your employment status?

» *Homemaker*

**S8b** Do you have any aspirations or plans to start your own company/business?

» *Yes*

**S9** Over the past few years, have you looked on the internet for online legal services?

» *No*

**S11a** On a scale of 1 to 5, where 1 means 'Definitely will Not' and 5 means 'Definitely will', how likely will you be to look for online legal services within the next 6 months?

» *4 - Probably will*

**S11b** Specifically, what types of online legal services will you be looking for?

» *Incorporation/forming a business or organization*

» *Estate planning*

**S12** In the event you were in need of online legal services, which of the following describes your role in determining how to go about obtaining those services?

» *I share or would share this responsibility with others*

**S13a** Please tell us what kind of device you are taking this survey on.

» *Computer or Laptop*

**Q1a** When you were interested in looking for online legal services, how did you go about finding what services are available?

» *Used an internet search engine*

» *Asked friends/family*

» *Asked colleagues*

» *Spoke to a lawyer*

**Q1b** Which search engine did you use to look for online legal services?

» *Google*

» *Bing*

**Q2** After looking at the search results, please indicate which of the following companies would you be interested in exploring further based on what you see?

» *www.incorporate.com*

» *www.legalzoom.com*

» *www.bizfilings.com*

» *www.incfiler.com*

» *www.delawareinc.com*

» *www.calfilings.com*

» *www.mycorporation.com*

**Q3a** Why did you select this company? *www.incorporate.com*

» *Affordable*

**Q3b** Anything else? *www.incorporate.com*

» *fast and easy*

**Q3a** Why did you select this company? *www.legalzoom.com*

» *advising on protecting personal assets from company liabilities*

**Q3a** Why did you select this company? *www.bizfilings.com*

» *fast and affordable*

**Q3a** Why did you select this company? *www.incfile.com*

» *price*

**Q3a** Why did you select this company? *www.delawareinc.com*

» *experience of 30+years*

**Q3a** Why did you select this company? *www.calfilings.com*

» *Specific experience i CA formations*

**Q3a** Why did you select this company? *www.mycorporation.com*

» *cost*

**Q4a** Which, if any, other companies that you did not originally select would you be interested in exploring further?

» *None*

**Q4b** Please tell us why you did not << initially >> select *www.rocketlawyer.com*?

» *free of charge*

**Q4b** Please tell us why you did not << initially >> select *www.smallbiz.com*?

» *didn't sound trustworthy*

**QB5a** Thinking back to the Google search page, did you notice an ad for Rocket Lawyer?

» *Yes*

**QB5b** Thinking back to the Google search page, please tell us what you recall about the Rocket Lawyer ad.

» *its free of charge legal formations*

**Q5c** Even though you did not previously choose Rocket Lawyer, are you willing to explore their website?

» *Yes*

**Q6a** Did you get the information you need from this page to help you make a decision? If not, please review the page again.

» *Yes, I have reviewed this page (Page 1)*

» *Yes, I have reviewed this page (Page 2)*

» *Yes, I have reviewed this page (Page 3)*

» *Yes, I have reviewed this page (Page 4)*

» *Yes, I have reviewed this page (Page 5)*

» *Yes, I have reviewed this page (Page 6)*

» *Yes, I have reviewed this page (Page 7)*

» *Yes, I have reviewed this page (Page 8)*

» *Yes, I have reviewed this page (Page 9)*

» *Yes, I have reviewed this page (Page 10)*

» *Yes, I have reviewed this page (Page 11)*

» *Yes, I have reviewed this page (Page 12)*

**QB7** Now reflecting on the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed, what can you tell me about the Incorporation offer?

» *informative and illustrative enough Packages are high priced than others*

**Q9** You may have already mentioned this, but did the Google ad for Rocket Lawyer and the Rocket Lawyer website you reviewed include a free Incorporation offer?

» *No*