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November 8, 1989

MEMORANDUM

To: Susan Stuntz

From: John Lyons *JL*

Summary

Les Zuke at Philip Morris has asked us to provide him with the database that contains the names and addresses of all companies that have received workplace smoking materials from The Institute over the last two and one-half years.

Zuke indicates that PM has asked Matt Reese to survey these companies to determine the effectiveness of the TI materials, with an eye toward helping Philip Morris develop its own corporate assistance program.

While the request is technically simple to comply with, we do not believe a survey such as the one Zuke describes will advance the stated goal of establishing a workplace program, and raises significant concerns about our ability to maintain the confidentiality of our "client's" requests.

Should Institute management concur -- I would recommend that we work with PM as they go about establishing their own corporate program. We will be pleased to share our materials, our experiences and our thoughts on their ideas. We also will be pleased to share with them the results of our own evaluation of our workplace program, which is currently in the development stage. I do not believe we should share our database with PM so that they can undertake their own evaluation of our program.

It may be, however, that quite apart from their stated interest in establishing their own corporate assistance program, PM's true agenda is to conduct its own evaluation of the TI program. While we agree that such an assessment is appropriate, we believe that The Institute, as the developer of the program and the holder of the database, is the best organization to undertake that evaluation. Such an evaluation would be shared with all member companies, as all have an investment in the program.

TI DN 0008779

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Discussion

On October 18 I met with Les Zuke and a representative from Burson-Marsteller, at Zuke's request, to brief them on the TI public smoking corporate assistance program. Zuke said that the purpose of the meeting, which ran about 3 hours, was to advise PM on the TI program, as PM was considering establishing a similar program of its own.

The following day, I spoke with Burson-Marsteller for another hour, again at Zuke's request, explaining the scope of Gray Robertson's work for the industry. Burson indicated that it had been asked by PM to retain a "Gray Robertson type" to spearhead its workplace program.

During the October 18 meeting, Zuke indicated that PM had retained Matt Reese to survey all of the "clients" served by TI's program, to determine the effectiveness of the TI program, and to guide PM as it develops its program. He has indicated that the request for the evaluation comes from Jack Nelson and Ehud Houminer.

Zuke has asked us for a printout of all of the "clients" who have received TI materials over the last two and one-half years. He followed up with a copy of a lengthy (40-question) telephone survey instrument that would be used by Reese.

We do not believe that this plan, which will rely on some 3,000-plus names, some of them more than two years old, will significantly advance PM's stated agenda of developing its own workplace program. PM proposes to cold call decision makers and ask about unidentified materials (the draft survey does not ask specifically about TI materials) used in decision-making processes that may have occurred more than two years ago.

Since most of the companies who contact us seek our materials in an effort to "balance" the information they receive from the anti-smokers, it is likely that our materials could be confused with the anti-smokers'. PM, therefore, is unlikely to get what they could call a true evaluation of the TI program from this survey.

Recommendations

We are prepared to work with PM as they seek to develop a corporate workplace program of their own. This assistance may take the form of additional briefings,

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sharing of materials, or reacting to PM plans. It would be our request, however, that a Philip Morris employee make all requests and be present at all briefings. We do not believe it is appropriate for us to brief Burson-Marsteller employees on our program.

We also are prepared to undertake our own, internal, review of our corporate assistance program. Toward that end, we are working with survey research consultants to survey a more controlled sample from our database, to ensure a survey that can truly evaluate our program.

We believe we can develop a survey that will address many of the issues contained in the PM survey instrument, but will more effectively evaluate our own program, rather than all workplace assistance programs. In addition to surveying past "clients" we also will implement a program that allows us to follow up and survey new "clients" on a regular basis.

We also will consider some focus panel testing for our messages and our materials. And, just as we asked a human resources expert to evaluate our materials when we first developed them, we will take them back to such an expert for follow-up comment.

cc: Martin Gleason

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