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## Insights Leaders COVID-19 Roundtable

July 28, 2020

### Panelists

**Kim Harrison**, CEO, Focus Forward

**Miriam Alexander**, CEO; Lead Principal, Go Deep Strategy

**Nancy Smith**, President & CEO, Analytics Partners

**Richard Clarke**, Senior Vice President, Potentiate

**Rob Key**, CEO, Converseon

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Gregg Archibald: What I want to do is start out with taking a look at what's changed. In October, November, December, January, we were all doing, executing on our plans and having the regular bumps of business. Then March came, early March came and the world changed. All of our worlds changed. So if you think of the key pieces of what's changed for your business over the course of the past – I should be able to count those number of months - five months or so, what I want to do is get a little bit of understanding, business levels, the kind of relationships that you're having with your clients and the types of questions that your clients are asking, what's being expected of you, those kinds of really big-picture things that cut into the heart of the business. Rob, since I know you better than anyone else here on the phone, I'm going to start with you. **Give us a perspective of what's changed for Converseon over the course of the past five months.**

Rob Key: Yes, okay. I'll be happy to go first. I think it's been for the space we're in, and we're pulling from all this massive amounts of social media, it's been an incredibly interesting time because a lot of this crisis lives and breathes within social conversations, the good, the bad, and the ugly of those conversations. That bled right into all the kind of diversity, BLM kind of crises. So we have this kind of crisis moment, the crisis moment that we're kind of leaping from and to and our clients are trying to make sense of this environment where things that they haven't really seen before, at least at this kind of scale, we all woke up - I think I go back to even 2001 which is actually the first year Converseon existed, that was an agency before we were a technology company, and we woke up the next morning and the world was different. It was never going to quite be the same and I think this has happened here.

So what we had to do is change our solution set and what we do is machine learning. So while we have this massive amount of unstructured social conversation data, it's how do we pull in our machine learning models to glean out those insights and those perspectives out of this massive data set in ways that clients would care about. Because a lot of the stuff that maybe we were measuring before, things like just general sentiments or kind of some emotion, I mean interesting but probably not top of mind for CMOs and CEOs in this environment. They want to know, for example, how are the perceptions of what we're doing being seen by consumers and social data in terms of safety and in terms of trust



and in terms of customer experience, how are we making adjustments in ways that meet the new needs for the new consumer. We did some really interesting research with Gen2, with Gregg, with you and some other partners that I thought started to get at that.

One of the things that we really turned our attention to is this concept of brand purpose. Brand purpose is one of those things that's been around for a while but it has a much sharper edge right now in this environment. That basically means how are you as a brand making the world a better place. Edelman Public Relations had a really good study that showed that 90% of consumers are looking to understand how brands are jumping in to help address COVID issues. You see things like Delta Air Lines using their flights to help get PPE sent around. You see McDonald's and others kind of changing the whole experiences and giving some meals to first responders, etcetera, etcetera. So what we did is all those machine learning models that we've created, we had to create a new generation of machine learning models to get it measuring precisely what brand purpose looks like – I'd go through a little bit more detail but it's in areas of environment, safety, trust, product, and precisely measuring how effectively your brand purpose is being seen.

That's really been quite a breakthrough because it seems like this kind of intangible asset but when you can quantify these perceptions driven from social media, it starts to become a guiding navigation force that our clients are using to help navigate through this very difficult time. So we basically can score brands from -100 to +100 on their brand purpose score and then break it down into all those sub-drivers which includes safety but also include things like diversity, so the perceptions of your diversity efforts or the perceptions of your COVID efforts compared to your peers in your industry but also across industry, amongst leaders and laggards. We basically had to kind of reinvent an entirely new solution for this kind of COVID era and do so in a couple of months. That's where our focus has been.

Gregg Archibald: So you are working with existing data. You're not having to go out and collect new data. Have you seen that as an advantage, a disadvantage? **Are clients either really kind of digging in on this idea of let's take advantage of what we've got or is it similar to what it may have looked like in the beginning of the year?**



Rob Key: I think in fact, eMarketer has a new study that just came out that showed, that said 51% of marketing leaders are turning to social data to figure out what's going on near real-time and that's one of the benefits of social data. It's always on. It's always there. Yes, it's messy. Yes, there's all kinds of challenges with processing that data because the language is very complex, sarcasm, slang, some of the algorithms at the social listing platforms as you know reward kind of bad behavior and other things as well. But when you apply the technology right and you weed through all that stuff, you have all this data at your fingertips in real time. So what we're able to do is just simply a lot of folks have some access to social data or we have the social data. It's just applying these new models on top of that data already and those adjustments. So for our business, actually we have a lot of momentum in our business just because of the real time and also safe nature of it, right? I mean we're pulling this data, public social conversation data, and some of the other more traditional kind of survey-based type techniques are a little bit more challenging in this environment.

Gregg Archibald: So Nancy, I've got to tell you, I've never heard the phrase "data to expertise" but I absolutely love that phrase and jotted it down. So I may try and use that once or twice in my life going forward. **So how are things changing for you guys?** From what I understand, you guys do a lot in media and advertising as well, is that right?

Nancy Smith: Yes, that's correct. I mean we work with our clients to help measure their performance and the drivers of their performance. Media and marketing are typically key drivers of performance among many other factors. So we apply a holistic understanding of their business so that we can really tease apart the drivers. So as you can imagine, we have a wide range of industries that we serve. So we had some industries that really picked up the pace during this challenging time such as retailers, food service who really had a shift towards more delivery models, had to reinvent overall their supply chain. Then we have other clients who really went on pause for some time such as hospitality. So we really adapted through this time and we're able to dial up measurement and analytics for those clients that really needed it and really needed to understand day to day, week to week what was driving their business. Consumer mobility was a big challenge for many. So we integrated that data into our analytics, into our models. For those other clients, we went on pause and we helped them through some scenario



planning. We've recently dialed that back up and have worked with really all of our clients.

I would say one of the biggest shifts that occurred through this time is really looking at the crisis, looking at where we are today in stages. So we had the crisis. Now, we're in a bit of stabilization but we're kind of in this flux and looking forward to recovery. We've helped our clients with scenario planning, so looking forward to understand the expected performance, what possibilities exist in terms of outcomes, and then what can they really change to affect those outcomes. That's really been powerful and impactful for many of our clients in terms of when do they dial up their communication to their customers especially for retail, companies coming back now. We also have the experience globally because we're in China and Europe. So we've seen some of our clients who are multinationals come back in those markets, what's worked, what hasn't worked, and we can apply that here in the US.

Gregg Archibald: **So is this scenario planning either relatively new or growing piece of your business?**

Nancy Smith: I would say it's always existed but much more focused around key planning windows as client set budgets or looking at quarterly changes but it's become much more dynamic and much more prominent throughout the organization really from the top-down to understand the impacts and potential impacts for things like consumer mobility and how that may change over the next several weeks and months.

Gregg Archibald: I'm hoping to be more mobile at some time in the course of the next weeks and months.

Nancy Smith: Yes. I think the key challenge there is for clients that have an e-commerce as well as a brick-and-mortar footprint, how do they balance those two. As e-commerce is taking off but as brick-and-mortar comes back, how do you ensure that you maintain that strength in e-commerce while still growing back the brick-and-mortar footprint.

Gregg Archibald: If you have that answer, just shoot it over to me in an email. So Miriam, what about you? **What's changed with your business over the course of the past few months,**



**particularly when we're thinking about qualitative-led strategy and companies trying to figure out what's next in the world?**

Miriam Alexander: I would say that everything has changed simply because I live in a world where my life is lived on airplanes. This is the longest I've gone without being on an airplane since I can't remember when. Clients are sort of trying to figure out what do we do here. I'm seeing a whole range of scenarios ranging from - in the hospitality industry, I got to get approval from an SVP to spend \$5,000.00 to other less severely impacted firms saying "Well, we kind of want to be full steam ahead but we don't know what to do." That's sort of where we come into play. We have like Nancy, I sort of have seen this as two distinct phases. The first was what I'm calling shock and awe which is like "Oh my God, what do we do, how do we get everybody set up to work from home?" That lasted for a bit. We're now into this place of, as I heard Ted Danson say this the other day, it's like you're on a boat in the middle of the ocean and you can't see where you left because we're that far out and you can't see where you're going yet because we're not close enough. I feel like everybody has sort of realized, okay, this is where we are and the question is what do we do for our business to help us either survive or move forward.

I am encouraging clients wherever possible to do longitudinal work because I think that just like none of us are static, everybody in the world is not static. Things are changing and it's really important to understand the cadence, the pulse, and the feelings around what's going on. So we're doing a good bit of that to the extent that we can. We're finding that clients need to be much more selective about the kind of work that they're doing, because budgets quite frankly have been decimated. So people are needing to be much more judicious about where they do insights work and they need to see for the most part tangible value coming out of that work as opposed to let's do something really exploratory and understand X, Y, or Z. There is a fairly tactical application for most of the work that we're doing right now.

Gregg Archibald: That's interesting and we've heard that a number of times that the idea of - trying to embed strategy within that tactical work has been another theme that we've heard trying to do some brand work but it's got to have some very clear, near-term application. **Is that kind of what you were talking about and that balance**



**between being judicious with the spend and trying to deal strategy at the same time?**

Miriam Alexander: Absolutely. Work needs to sort of serve these multiple masters of can we be somewhat foundational. If our CMO or our CFO or whomever is going to sign off on this work, we've got to show them what it's going to do now. So it's really a mirror to both because the world in which we operate is a world that tends to live in the marketing org and at the end of the day, budget authority and signatures come from the CMO.

Gregg Archibald: Richard, let's move to you because you've got a little bit of a different perspective. You guys have kind of a marketing insights component but you've also got some particular focus CX and employee engagement. What have you guys seen over the course of the past six months and how is that changing, where are you guys now particularly with the CX and employee focus?

Richard Clarke: Great question, Gregg. I'm going to mirror a couple of things that Miriam just talked about, this whole kind of shock and awe component. I think Miriam was saying everything's changed. I couldn't agree more with both of those sentences to be quite honest. It's been really interesting to watch this wave kind of spread across the globe, but our largest office is in Australia. We do a lot of CX work out of there. Australia was kind of hit around about the same time that the US was in terms of having the lockdown, those sorts of things. So we think about our client base and what we're doing with our clients down there. We do a lot of work with automotive for example. So if you think about the CX the programs that were out there, the silo CX and the service CX, all of a sudden, your into dealerships. Really for I would say the first two, three, four weeks of the lockdowns we were seeing, I think the best way I can think about it is paralysis. Nobody knew what to do. Nobody knew how to do anything. So what am I even responding to, how long is this going to be a change for.

I think you had that going on for about three or four weeks and then people started to shift, that shift in mentality a little bit in terms of this is now becoming a bit of an undefined reality. So we've got to figure out how we adjust what we're doing. It really kind of comes down to that ability to be agile. So one of the questions that you asked us, Gregg, was kind of what's going on in our business,



what's changing in our business and I think it's this idea of shifting away from the status quo. So how do become much more nimble and much more agile in terms of what we do to help our clients and that's fundamentally key. So if you think about retailers, move to e-commerce, so what are you measuring? You're no longer measuring an in-store experience but is that online experience exactly the same as somebody would go through in store, what does that mean in terms of the measurement that we need to be doing in working with our clients. So there was that kind of period of adjustment that's going on. I think that's really important because as we move into this kind of next phase of where we stand at the moment and whatever the future looks like, it's a necessity to be kind of agile and be able to shift and change.

So there's that tactical side of it. At the same time, there is the emotional side of working with our clients. The clients that we're working with are going through, they've got colleagues, friends, partners that have been furloughed or laid off and those types of things and they're going through a really, really big emotional challenge from this, so how do we help them, how do we help them feel good about what they're doing and adjust and be proactive. So that's what I mean by change, right? Everything has changed. It doesn't matter what component that you're looking at whether it be business development, whether it be ongoing product delivery, whether it be the insights that we're trying to generate, whether it be the clients that we're working with, we have to help them change and we have to change.

Gregg Archibald: You bring up a really good point because the nature of work has changed in the US, the unemployment rate is very high, we have a whole lot of people that are unemployed right now or furloughed and many people are working from home. **So how are you kind of looking at or how are clients engaging with you on the side of employee engagement in terms of trying to figure how this is impacting employees, what to do, and how it might change in the future?** Are you guys doing a lot in this area?

Richard Clarke: Yes, we do some work around that whether it be kind of EX programs or whether it be through other things like things like communities, kind of the idea of getting employees into a community but it's about this idea of being longitudinal EX and those sort of things can be viewed as kind of a singular point in time and basically





measurement with yardsticks if you like. With what we're experiencing and the flux of it if you like, the necessity to be engaged is absolutely paramount because employees might be feeling great one day but then you get a news break that comes out that afternoon and every - completely different headspace, right? So this idea of actually engagement and a longitudinal engagement is paramount here because that's what's going to drive success, that's what brings people back together, you're having that kind of commonality if you like. If you're only using a measurement, a yardstick to do that, there's going to be subtleties that you miss along the way. Those subtleties as you will drive engagement between those employees and the brand very much the same way that it does with consumers, right? So I think we need to make sure that we are keeping that kind of hopes if you like and keeping an open dialogue when it comes to things like employee engagement and it can be employee experience.

Gregg Archibald: Last but not least, let's talk about you in this qualitative world that's been topsy-turvy over the course of the past several months. **How are things going with you, what's different, what's changing?**

Kim Harrison: Well, we are in the qualitative services area supporting full-service market research firms to get their objectives met and the right people for projects. What we've found is that certain industry sectors, the demand is higher in those areas and other brands, other types of products and services, we're not seeing research as high of a level. So our role has been to work on really bulking up the reach of our database and the reach of our social networking and the different ways that we get people into online focus groups, TDIs, into product tests, cameras in their home have become even more popular for ethnographic research, all of those pushing into the areas where we need more people and pulling back on areas where research has hit a little bit of a pause button there. So that's where we've seen the differences.

Gregg Archibald: **So what areas are you seeing with more need?**

Kim Harrison: I mean we're definitely seeing more need in the pet care area.

Gregg Archibald: Fair enough. Everybody's getting their new COVID pets.



Kim Harrison: Yes. I mean pet care is seeing a serious spike, also in products that would be used in your home. Whether it's appliances or cleaning products, other than Clorox, a real focus on products and services that would be used in the home environment. We're also seeing a lot more research on virtual schools. We have a number of clients who were doing online K-12. They pushed out their research in that area in order to figure out how to get their message out to parents nationwide at a higher level as it's becoming less certain that school is going to happen in a traditional form going forward. So we definitely see more service, more research in all of those areas that surround the home, pets, nontraditional education. Our IHUTS or products tests have increased to the high level, where before some research, was done via intercept or other methods, we are shipping products to people's homes much higher. Also, QSRs, QSRs have been a strong vertical for us as well. Going forward, we're starting to see – our core focus has been nationwide recruiting because boards and online focus groups tended to be more of a nationwide focus. We are now seeing demand for those types of things in individual markets down to the zip code area. It feels like there's a slight movement towards what maybe would have been in person at a location now talking to the same geographic area but then the online component at a higher level than before.

Gregg Archibald: That's pretty consistent. The online qual, there's a lot of companies in online qual that are really busy right now. So I want to shift gears a little bit both in content and in style. So Richard, you mentioned something that is important as we kind of think about how we're all handling this as business leaders. You talked about the emotions of some of the people that you're working with when their colleagues are on furlough or whatever that may be. We're all business leaders and we need to deal with this as a business leader as well not just with our clients but for those people that we work with. So **what are some things that you guys are doing differently than you used to be in terms of managing your teams but also managing your own personal sanity and work and that kind of stuff?** I've said we're going to do this in terms of content and style, so let's just open it up to anyone, **who's got some good ideas on what they've done differently to help manage their teams and to manage their own personal life?**

Miriam Alexander: This is Miriam. I'm going to jump in because I am guessing that the disruption to my previous life is probably more significant than just about anyone - I may be



wrong, given the amount of traveling that I was used to doing. The biggest challenge for me both as a leader and as a human being was to – I mean I used to joke that I should get triple miles for the trip from my upstairs office to my downstairs office. The fact that I am now confined to a space when I'm used to thriving on the energy and the excitement of being out in the world and connecting with people whether it's clients or respondents, that's been a huge change for me. I will confess at my own expense that there was a day when I actually found myself sitting in my car in front of my favorite closed coffee house, they were open for to-go with the cappuccino working just for the disruption. In terms of the people who work for me, the good news is that we have always been virtual. So we've been very lucky in that we haven't needed to make a lot of adjustments and we cover time zones and all that kind of stuff. So that's been pretty seamless for me. The bigger piece is the sense of responsibility that I feel to keep the engine running, to make sure that there is a enough work so that people are not deprived of income. I feel that sense of responsibility very acutely.

Kim Harrison: Miriam, I agree with you. Although many of my employees were virtual, we had a physical office. That sense of responsibility is heightened. We do Monday meetings just to share information and to spread out the feeling that everything is going to be okay and we're going to get to the other side of this, really thinking about what all of our team members are experiencing emotionally both through our firm and the changes that have happened there. Also, they're part of the conversation watching people in other companies that have been our clients for 10, 15 years or longer and that those clients had had a 10, 20, or sometimes 30-year career with a particular company and they've been put on furlough. That weighs on everyone emotionally. So really supporting and understanding the staff and our clients where they are right now emotionally is a new component to the business that maybe wasn't there before. Maybe it should've been but it wasn't there three or five years ago at this level.

Gregg Archibald: So Kim, you mentioned you're having these Monday meetings where you're sharing with the staff kind of what's going on and so they're part of the conversation. **Is this a new thing that you're doing or are you doing it differently or is this ongoing from prior to?**



Kim Harrison: Yes, I mean that's a great question. This is new on a weekly basis and it happens on Zoom with the whole company. We were doing once-a-month meetings with the whole office in our office and once-a-month kind of brief update calls with the whole company. But every Monday at noon, we have the whole company on the executive team talks. I talk for at least 20 minutes. Now, actually because this marked Week 20, we've started with client voices. So Merrill Dubrow was our first guest and he was there on Monday. He talked for 20 minutes about what he's seeing in the qualitative space. Sarah Codfell will be coming on next Monday and we have a series of our clients out there sharing what they're seeing in the industry so that it's not just the company's voice in the room but we're able to give everyone in our firm a macro perspective that's so challenging to get. Even though they get some of it on the virtual conferences, it's just not I think entirely adequate to carry you through every day, every week, and every month. So these virtual meetings are new and they happen consistently. I think that they make everyone feel better because I have to say even if somebody has a day off or their shift starts later than the meeting, they're still on the meeting even though we don't require them to be just because they want to know kind of where we are this week.

Gregg Archibald: That's a pretty cool idea. So hopefully, there'll be some others born from that. Anyone else, how you're handling things differently, connecting with your team, managing your team, and managing your personal life like sitting in front of a closed coffee shop.

Richard Clarke: I'm just going to jump in here, Gregg, with a couple of thoughts as well. I saw an article a couple of weeks ago and the title of it was "Are We Working from Home or Are We Living at Work?" That really struck a chord with me and I think for a lot of people, it probably does as well because trying to find that balance is incredibly difficult. All of a sudden, we're becoming teachers, we're becoming playmates, but we're also having to work, we're also having to look after a team or teams globally. I think one of the big things that I think we all struggle with is there was a social aspect to work as well. I think our team is on a global crisis. The social side of it is incredibly important. So it's not just about the business communication, how we're doing at the moment in terms of whether it be revenue or financials or products or whatever it is that we're doing but how do we help our teams connect, at the same time, feel that kind of collaboration. That's really, really important. So



we were lucky from the get-go that we were set up as a business to be working remotely in the first place. But as people are now forced to do that where we have teams of people that used to be together and after work, they go out and get dinner or drinks or whatever, how do we help them keep that social connection, because that social connection is part of our DNA and part of the bread and butter of what we need as a business because when we've got happy employees, that's when we can get happy clients at the same time.

So there's a lot of things that we do around that which is kind of that kind of social and emotional wellbeing for our team members. We're doing a lot of things especially there in Australia around making sure that we're getting kind of courses and different types of courses that we're helping our teams. It gives them something to talk about, gives them a reason to be on a Zoom call that's not just talking. Really, it's just about making sure that we're keeping that collaboration going and I think as leaders, it's our responsibility to our thinking that way at the same time.

Nancy Smith:

Yes, I would agree with that. This is Nancy here. We've done a lot more communication as Kim and Miriam were talking about, focused meetings, try not to keep it too long, but that social connection is so important. So we have offices around the globe and folks who have found new and innovative ways to connect socially whether it be a social happy hour when they share cocktails that they're making at home to trivial pursuit, where the loser needs to sing karaoke to everyone, that's from the team in Australia. But then they share those ideas. I think having those personal, social connections, you miss the watercooler talk, you miss that kind of ad hoc conversation. So that really enables a little bit more connection. The other thing that I think is really important is that folks take downtime. When things get - we went from offices to fully work from home. The only folks that are in the office now are our folks in China. But ensuring that our folks can take some time off and even if it's a staycation, a downtime day, we've had some folks take families to friends' house maintaining the social distancing just for a few days just to get out but that's so very important because, truly agree that folks are always on now and you do need that separation of work and home to some extent.



Rob Key:

Gregg, those are great comments. The only thing I'd throw in there is somebody mentioned dog food earlier so it reminded me of this. I haven't had breakfast so maybe they're related. I think we have to remember that we have to eat our dog food meaning that a lot of the research that we're doing, a lot of people are doing consumer insights is trying to feed information into companies so they can adjust and hopefully be better employers, build better products, have better insights to kind of meet these new needs, right? For brand purpose as the big thing that we're measuring, we have to remember that we're actually a brand too and that our brand purpose, by helping companies find and measure the brand purpose and become more culturally sensitive and addressing these needs, that we're actually making the world a better place too. So we have to answer the same question for ourselves that we're asking our clients to answer through this research which is how are you making the world a better place. What that's helped us do is we have people all over the place but they're unified under this idea that we're working together to get these insights to make the world better. I think that that's really important, that shared spirit and that shared vision and that shared purpose I think is more important than ever when you're not seeing each other and rubbing elbows in the office all the time. So we spend more time trying to instill what that is and why their work, even on basic levels of building machine learning models, is so critical to what's going on in the world today.

Gregg Archibald: **So what kind of activities do you do to help create that shared spirit and shared purpose?**

Rob Key:

Yes. I mean we're living on Zoom too. I think that we're publishing lots of papers, we're doing lots of webinars, we're doing lots of research, and we're spending just extra time spending it with our folks and our teams across the board from our technologists and our engineers and others who are managing AWS all the way through to our frontline people going through what our deliverables look like, what are the insights that we're seeing, etcetera, etcetera, and just having those types of discussions about vision. I mean things that I think would happen to maybe leaderships of leaders of organizations maybe like ours, I speak for ourselves, is that we think everybody just kind of gets it, what we're doing, right? It seems natural. Of course, we're trying to make the world a better place. Of course, we're doing this but there is often a disconnect between leadership vision



and what's happening in the trenches of organization. So that's become accented I think. I've even realized more that the extra care that it takes to be able to kind of instill that vision, and there's no simple thing to do except lots of time on Fridays. We do these things on Fridays mostly. Lunch, we let everybody expense their lunch, we're all there and we talk about these things and we show these things. There's no magic switch, just a lot of extra internal communication I think.

Gregg Archibald: Now, I have a crystal ball and I know that there is going to be a date in the future, I can't tell you what that date is, that there's going to be stability. It's going to be different than today which was different than six months ago and different – it'll be different. So that's what I know from my crystal ball. If we think about the insights industry at that point in time where there's stability or at least we don't have those, what is it, the killer hornets or the pigs that have found heroin or COVID or whatever these different things are...

Rob Key: Don't forget the aliens, Gregg. Don't forget the aliens.

Gregg Archibald: You got it. What is it that the insights industry looks like? We're going through these changes. We are going to continue to go through changes. **What does it look like when there's a point in time of stability? How are we more impactful, how are we doing things, managing things differently, where do you see this landing out?** I think that just jumping in worked pretty well. So let's try that again.

Richard Clarke: Certainly, Gregg. Can you email me that date? That'll be fantastic if you could. I think one of the things that I've seen, and I've been lucky enough to be in this industry for a quarter of a century on the global basis. We've been through some very, very strange and difficult times if you look back 10 years ago there's so many challenges that we went through there if we look at the shift from methodologies that we've gone through. Now, all of a sudden, we as a global race are going through COVID. I think the one thing that always stands out to me in these types of scenarios is that we are in very uncertain times. It doesn't matter what industry you're in, it doesn't matter what you do. There's incredible amounts of uncertainty on a global basis. So what does that mean for us as a business and an industry? I think the learning here is that there is no such thing as a status quo anymore. So we need to be challenging ourselves to look at things differently and do things



differently. In order to be able to do that, we as an industry and our clients are living this with us need to instill a degree of agility.

As I think about somebody earlier on the call was talking about a scenario planning, we can run all of these different scenarios but we just don't know at what point – even if one of those scenarios come true, what's the next thing that's going to happen that's going to change that scenario and we could be scenario planning. So the fundamental there is that we as an industry, we need to become incredibly agile. Our clients need to have the tools and the solutions. You can't take six or eight weeks to respond to a scenario anymore. You have to do it quick. So I think what that means for the insights industry is that everything is kind of speed up. If you think about the work that Rob is doing with AI and those types of things, that's going to be incredibly important in terms of that speed and agility. The solutions that provide that are really going to be the keys moving forward.

Gregg Archibald: That's basically driven by the need for faster decision-making in businesses.

Richard Clarke: Absolutely. Absolutely, yes, it is because those decisions need just to be made and different decisions need to be made as well but you need to be able to make them quick and really be able to pivot. If you haven't got the solutions that allow you to do that, then you are kind of behind the eight ball if you like.

Nancy Smith: Yes, I guess I couldn't agree more on the ability to decision and adapt and I think we are already there and so many businesses have had to do that and pivot and we've seen that. The one thing I would add though is a level of experimentation is going to enable that. So companies I think coming out of this when there is more stability and more money to spend, they're going to be looking to experiment to find those new white spaces based on new consumer trends, new consumer habits that have been created during this time. We've accelerated so much in terms of just consumer behavior from online activity to we talked about pets and staying at home and exercise to eating and drinking and baking. So I think those white spaces are going to be really where business is focused and look to experiment and be able to adapt and pivot is going to be really critical once they find them.

Richard Clarke: Nancy, you mentioned something there that I was remiss in kind of not adding in in my thoughts and that's kind of ROI, right? So we are going to go through a





significant amount of cost pressure until that new normal arises. So we as an industry, we need to be making sure that we're adding and really facilitating this idea of the ROI, of what an organization is spending and why they're spending, what is the value that we as an industry are adding and how does it impact the bottom line. I think the best continue forward into whatever this new normal is as well.

Nancy Smith: We saw that with the last recession, ROI was a big focus coming out of that and analytics was a big focus area as well. So that's pretty likely as well.

Rob Key: I just had a really, really quick thought because this is a little – I agree with everything said, expect no more vanity metrics, what are the things that really matter, all of that are. I also just think from a technology perspective that we're going to see much – instead of either/or solutions, it's going to be much more and solutions. I think that means APIs, more APIs and more API integrations and solutions that can layer on top of legacy solutions and helping clients get more out of what they've already invested in as opposed to ripping something out and starting new. I think that's just more kind of cooperation between platforms and technology providers so that we have ecosystems that are flexible and can adjust. I think we're seeing that already. I think that works already.

Kim Harrison: Rob, I completely agree. The other half of our business is transcription services or speech-to-text. We've had an API for a very long time. In the past few months, the use of that API and the API integration between platforms in market research and out clients in the corporate space has risen astronomically. I see that going forward as people are reducing their staffs and their headcount, they're really looking for automated solutions to get – they're dedicating that time to the long-term advantage of an automated solution which makes it just as fluid had it been if there was a person handling it because they're looking for the whole macro future.

Gregg Archibald: Yes. This is not something that we've really kind of discussed up to this point and that is the role of technology in kind of that integrated automated solution kind of approach. So this is really intriguing. Miriam, I interrupted you. Go ahead.



Miriam Alexander: No, that's okay. I'm going to take a somewhat contrarian view here. I do not disagree with what has been said but I think that the biggest driver of what happens in our industry moving forward is less a function of available solutions and more a function of the level of influence and respect accorded to the insights function within a client organization. I think that we already see it and I think that – again, you get the rise of the procurement departments versus - and basically to the extent that an insights organization within a client company is able to evangelize their function, show value, which gets back to ROI, and prove all of those things, those are the things that will drive the level of spend and the kind of work that get done. What I see happen all too often is you can really see a difference in an organization that has a very junior insights function versus one where you have a robust insights function that has been sort of proven to deliver the goods. Budgets are higher, the level of experimentation permitted is significantly higher, and the level of the amount of foundational as opposed to tactical, is it A or B, work that gets done is significantly higher. So I think that as much as we want to say this is what's going to happen in our industry, we are at the end of the day, in a client service business. Our job is to invent and innovate solutions that work for our clients and I'm not so sure that we know where that's going to land just yet. Does that make sense?

Gregg Archibald: Absolutely. It makes sense. During this time, the insights organizations have been called upon to try and help address a lot of things. A friend of mine said – he leads an insights organization for a brand, said “I am so tired of saying I don't know” and has changed a lot of things because the demand is there, the need is there, and a lot of insights organizations are stepping up and they're seeing the impact of that because in many cases, there are limits to what other analytical tools can provide. So it's starting to show itself and the power of that is a beautiful thing. I want to wrap up with that because it's a very optimistic viewpoint and one that I share. So I always like going out on agreement rather than disagreement. So I do want to thank everybody that has taken their time here today. The insights are amazing. The perspective, the guidance, the tips, you guys have just done a phenomenal job and it's going to add to the body of knowledge. It's going to help our industry continue to grow. So thanks to all and we will wrap it up here.