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## Insights Leaders COVID-19 Roundtable

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### Panelists

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Gregg Archibald: **Our first question is how is your business doing**, how are things going right now and given that you've got a lot of qualitative, I'm really interested to hear how things are going, what kind of changes that you're seeing, how your business is shifting.

Katrina Noelle: Yes. I think it's never been more important to kind of state the dates you're having a conversation about this. So, we're on July 7 at the moment. So, my answer would have been very different on June 7, May 7, April 7. It has been an insane spring and summer as we all know. I think we've gone through, like you were saying, the stages. We've gone through a few interesting stages. We realized how many of our colleagues really didn't have the digital qualitative practice in March and April and spent a lot of time advising people and kind of helping people through that transition, both client-side agencies, suppliers, friends, etcetera. We made a big step into digital qual around '08 for budget constraining reasons and have really been doing I would say if not half, at least 60% digital qual sort of since then. So in terms of our methodologies and what our clients were used to, we were kind of rolling with the punches. But really, it ended up being a spring of kind of pulling the industry together and having conversations about what that transition migration innovation looked like to make sure that things were happening digitally.

I think a lot of the spring was spent finishing projects and contracts that had come in before things struck. We're at an interesting point in the summer now because I think qualitative is used to having sort of a slower summer and ramping up for Q4 and we're not really sure what the pattern is these days anymore. So it's a lot of kind of crossing fingers and hoping that maybe the downtime was the spring and the ramp-up is kind of now through the end of the year as people really get



curious about why consumers are feeling what they're feeling, how that's impacting really every category across the map is being affected right now. So we're having a lot of conversations right now with clients about doing more frequent touch points with customers, not necessarily the big studies that takes months to prepare but kind of like coming in regularly and understanding how people are shifting at this time which is really important to do.

Gregg Archibald: want to come back in a few minutes to some of the things Katrina said. I keep wanting to call you Kristina, so forgive me. I'll get it right here in a moment, even with your name written right in front of me. We've heard some similar things to what you started, a path you started down so I want to come back to that in a minute. Glenn, how are things in your world? **What kind of changes have you seen and how are you adapting?**

Glenn Kessler: So about 50% of our revenues were related to central location applied neuroscience research so we use various tools. We have people sensors and EEG and so on. That's been on hiatus since probably March. Our focus has been on using some psychological tools to track brand movements and positioning, especially during this COVID era. So we're doing things like the MaxDiff a lot of quantitatively, a lot of implicit testing, and trying to replicate some of the information that we would've generated using central location neuroscience with sort of measurement of the subconscious using some of these other tools. So in terms of – I'd say we had a wonderful first quarter and then projects for which we received purchase orders for the first quarter were postponed. But for whatever reason, this last week has - goes week to week. There's been large projects that we're quoting on that people have to get done by the end of the year. But I predict



the rest of the year is going to be like this, up and down, probably 70% of what we would've expected.

Gregg Archibald: I think your number of 70% is pretty close to what the Insights Association has estimated for the year. I think they're saying generally speaking, down about 25, 30%, something along those lines. You mentioned this kind of week-to-week thing. We're certainly seeing that in our business and seeing that a lot of conversations will – someone will go, "We had a really good week" and you talk to them two weeks later and it's "It's alright." So this variability is huge. Ron, what's going on with you guys?

Ron Gailey: We do a lot of work in the US but we also do a lot of work in Central and South America as I mentioned. We have a number of contracts that were ongoing contracts for work in Central and South America and I felt really pretty safe at the beginning of the pandemic because we had these contracts locked in. But one by one, our clients called us and said "Our stores are closed. Panama shut down completely. Peru no longer is doing any business at all. There's no delivery, no takeout, even fast food." So everything was shut down. The same for I would say about 40% of the countries down there, they were hit worse than the US. We think it was horrible here and it was horrible here and it was devastating there because there is no safety net of any kind. It was just shut down. So they called us to renegotiate, which we did. So we lost months, we quit doing any work for some of them for a period of time but now they're really anxious to get back going again. Some of them, and we're fine, we just renegotiated timing for payments so that they could recover. That's it.

So I would say we're on a rebound right now but we're not rebounded at all. We're moving more positively. During that time, we changed our focus to a lot of small



or medium companies and reached out to friends, family, neighbors, any business who had something going, right, former colleagues, and we were able to make a fair amount of a difference just with new business that was small, smaller but it was helpful and I'm grateful for the amount of work we got through. I would say clients most companies wouldn't pay a great deal of attention to but to us, they made a difference.

Gregg Archibald: We all kind of adapt in situations where we have to adapt. So congratulations on making that shift and making up some of that ground. Peter, you're kind of in a unique place. **You're focused a lot on IT and operations and privacy. So I'm really curious how you're seeing this world right now.**

Peter Milla: Yes. I was going to say that I come from a different point of view because I'm not running a research business but what everybody I'm sure sees is a lot of uncertainty, a lot of delays. The problem with the delays is in the more normal circumstances, to use that word, if a client would say "We're going to delay the project," you oftentimes have expectation of what that meant. The project was going away or was going to be done in three months or maybe the same time next year, that kind of a thing. Clearly, the companies that are focused on technology and automation, those are the ones that are doing better. I see the cycles that we've seen, the industry and other downturns and crises. The companies that are able to have cash positions or maybe even have an offer that sells better in a time like this, the ones that are looking for opportunities in a crisis are going to likely come back very, very strong after this. I see actually some, and some players in sort of resettlement in the market.

As we said here, if you're using methods that rely on in-person, those are obviously particularly challenged. We'll talk later but I've been thinking a lot about sort of



what the future of business is going to look like in automation and what companies are going to do. I mean I was buying beer in a beer distributor – we have beer distributors in New York, you buy beer and soda and the guy behind the counter was pontificating, the customers, “There’s this wonderful thing called Zoom now and all my customers are working from home.” I talked to them later a little bit, I said “The technology has been around for quite some time” but a lot of companies don’t realize that what we’re doing here, a lot of people can work from home. I’ve already seen where I live on Long Island some people telling me, “Well, I’m going to work from home now. I maybe go to work go to the office two days a week and it’s going to make life a lot easier and safer” and some things like that. So a lot of what these guys are seeing have a different – an opportunity to see some different things as well.

Gregg Archibald: Yes. So, you bring up a couple of good points, Peter. In terms of this idea of having an office and working from home versus working from home, and Peter, I’m actually going to ask you because you see a lot of things but for me, we’re a very small company and I’ve worked from home for the past 10 years, 12 years. So this is all kind of just in the flow. What do you think this is going to head in six months? Do you think we’ll ever go back to the office if you don't have to?

Peter Milla: Yes. The one thing that nobody – we haven’t talked about yet because we don't know is this Phase 2 or the second wave, right? Fauci said just the other day that we’re still in Phase 1. I think what’s happening in the American Southwest and what's happening on the West Coast is just a natural sort of progression of migration of a disease like this. So whenever it comes back, if say the second wave is minor and things get back to normal and we’re able to control this like the European countries have where the tail now is very flat, we had a spike here



recently, I think what's going to happen is that companies are going to take advantage of the fact that not everybody has to work from home. I've seen companies that do this well and at the same time when they realize they had to work from home, they've instituted all kinds of mechanisms like structured virtual classroom training, stuff that was more informal lunch and learns is now formalized and has a curriculum behind it, mechanisms, messaging. The good companies, they have standard messaging and they're encouraging people to take time off. They're encouraging people to ask their supervisor for help. So I see a future where companies will have offices, I think those offices may well scale down. I think certain types of jobs will have to be in the office.

An example I saw last week, a company I was talking to, as part of a merger, had deferred a major technology integration because they couldn't physically get the tech guys into the office to do the necessary work. So you'll see, there's going to be offices that's going to be scaled back. I think you may even see sort of this counter to this re-urbanization trend, maybe some re-suburbanization, right, if that's even a thing, but that kind of thing. I've talked to people like you who say "What's the big deal? We've been doing this for many years now." So in my life, it's we work from most of the time but then travel to Europe, it's not happening, right? I don't know when that's going to happen again.

Gregg Archibald: So Glenn, what about you guys? **How are you guys adapting to the work from home, the kind of new business model approach?**

Glenn Kessler: Well, I got to say in '96, I had an employee who's my only IT guy and he said "I'm moving to Florida. If you want me to work for you, fine. If not, I understand." He left and we had just started. We were three years into the business. He had a DSL and he managed everything from here. He printed reports. He did everything. So I



learned then, and I have enough people here – we have two office condos. So I don't need space. But the commercial real estate market is so poor and getting poorer, I got to figure out what to use these for. So I'm very comfortable with people working from home and I always suggest that if you're not, you have the wrong people because [Laughter] that's the most important thing. I also regarding the second wave, I've written the year off. If I had to decide whether there's going to be a second wave or not, I don't know if the first is going to end but there'll be a second one. So all my assumptions in terms of forecasting and our central location work is that it's not going to happen and everything will stay as it is, people working remotely, and really getting this done efficiently.

Gregg Archibald: So, your forecasting is taking it into account or you are doing that based on the expectation that there's not going to be a significant period of time between the first wave and the second wave of the virus.

Glenn Kessler: Right. I mean just following the news, it seems like the second wave was supposed to be in late fall but the first wave is still going on, they could merge together. That's my guess for business purposes.

Gregg Archibald: I want to come back to something that you said, Katrina. Everyone is kind of experiencing this in some way, shape or form but you mentioned that clients are coming to you with kind of smaller pieces of questions, approaching things maybe a little bit differently instead of coming in with a big question, working with bite-sized pieces, how is that displaying itself? **Is it still kind of the same big businesses issue and just broken up differently or what?**

Katrina Noelle: Well, I should clarify. We are coming to them with that advice. I also just kind of wanted - I don't know if I can make this segue elegant or not but I did want to





touch on this idea of remote work because it's not just your team, it's not just your team working remotely, it's the way you do business. So we've had a remote team since the beginning. I hire people based on who they are, not where they are. But the idea of lacking business development meetings, in-person brainstorming sessions, conferences where you meet people, time to sit down and use a whiteboard together and talk through business problems and issues and things like that, that's what we are really feeling the lack of. Not necessarily where you're physically doing your day-to-day but that kind of collaborative work. That is kind of a tricky situation that we're all in, right, there are virtual tools but what is going to be the hurdle to get us to really collaborate seamlessly virtually. So I think that's where some of these client conversations come from. It's a lot of us reaching out to them and saying "We know you are probably not doing your annual X study or you're probably not planning your ad campaign nine months in advance because you're going to have to send out new messages every week at this point, right?"

So it's more about saying what tools can we bring to them to say "Can we have a touch point conversation? Can we maybe not try to solve everything?" That really came out of a lot of clients coming to us and saying "We don't know when to do research. We don't know when this is going to be predictable and projectable." We've said "You're right. Nobody knows that. Nobody knows when this magic moment of time is that people will start behaving like this for a foreseeable time period." There is no golden moment. So I think the reason to have these conversations about what is the brand doing right now, what decisions are you having to make in the short term and trying to get some feedback on that decision is really key. I think it alleviates a lot of pressure on the brand side to say "Okay, maybe we don't need to crack this whole nut right now." But you're right. Maybe we just have to get through July and what do we need to do to get through July.



Gregg Archibald: Got it. What about you, Ron? **Are you seeing anything similar or approaching it in similar ways, making smaller – I'm going to use the word "agile," we'll just go with that word, smaller, more agile approaches to solving the immediate issues?**

Ron Gailey: I do. I think it's totally true. I think we've been thinking very short-term as well and doing research that helps in the short run, right? I mean great, big landscape studies and so forth like that, they're very hesitant to do that. But you can do a small where are they at right and they're happy to get the guidance. So I would say yes, more shorter and fewer, quicker, and some tight online qual to inspire us onto what to do on the quantitative side. But you don't take a lot of time with these things, nor can you, right, because they have to be very responsive. We've also created in our qual work, it's very iterative because we don't know precisely how people feel. So we do qual, it's not the same qual, qual, qual in multiple groups but flowing where you do qual and you learn things and you modify your guides and you change on the fly and the next group really doesn't see the same thing as the first group does because you're constantly learning and building on your knowledge base. The client loves that. They watch them too because they're on Zoom in the background, they love this, and they're figuring out much more quickly where they're going. That's on the qual side.

I'd say the quant side isn't much different. One of our major clients, we're just on retainer and we do short study after short study after short study for them as they're trying to figure out now what do we do in this country or what do we do in that country. As a matter of fact, they've cut many things but the one thing they haven't cut some of them is research because to figure out the next steps is very – they don't know where they're going either. Therefore, the beauty of the short turnaround, quick study is important to them.



Gregg Archibald: So both of you have talked about that. At the core of what that is a little bit of changing relationship between the supplier and the client trying to figure this out together, being less about an order-taker or “Let’s jump in, let’s do it together and we’ll figure something out,” which is more kind of relationship-oriented. Glenn, **are you seeing a changing nature between suppliers and clients and how that relationship from a business model?**

Glenn Kessler: Sure. So I sort of looked at the changes like we’re seeing now as opportunities for brand tracking. So a brand during good times may not want to position themselves as a brand for the wealthy. It may be as Mercedes did around 2010, they went from “Feel proud you’re driving a Mercedes” to “We’re one of the safest cars” because it sounded better when people are losing their jobs to have a safe car than a car that suggests you’re making it while others aren’t. I think this is an awesome, awesome opportunity to help companies predict how they should be positioned in three, six months from now. As a business opportunity for a market research company, it’s great if you can get in the door and get into the business because it’s a wonderful time to do it. But I’ve seen a few by - we’re focusing on using implicit testing to identify as one of the tools in doing the brand development positioning but there are many other ways to do it. Now is the time. It’s just getting out there and getting people’s attention. I think people’s attention is not what it was maybe six months ago. People were worried about their jobs, even our clients are I’m sure very concerned about whether a month from now they’ll be on furlough or laid off. So I find the attention level is less.

Gregg Archibald: Thank you, Glenn. So I’m going to switch gears a little bit and ask how you are personally adapting to change – at the beginning of this and at least for the US, kind of the first or second week of March when there was widespread realization



that this was real and serious and we started to shut things down. There was a bit of denial on my part in terms - and out of probably some denial but also out of ignorance how long this was going to last and the severity of it. So my personal style of adaptation for the first couple of weeks was denial. But from there, it's been really looking at how I'm managing my day, the priorities throughout a week with the occasional lapse of "No, this is just going to go away" and then I come back to reprioritization. **So how are you guys kind of personally adapting, what changes have you made to help drive you in a good and positive direction?**

Katrina, I see you nodding your head up and down a little bit so we're going to start with you.

Katrina Noelle: Yes. No, I'm with you on that. For a while, we were sending proposals with a Plan A and a Plan B in kind of the hopes that we could do the Plan A and we've just sort of stopped doing that. [Laughter] We're just going to go with the way that we think it's going to happen which is often digitally, which is fine right now, and I think one thing that we spent a lot of time doing last year was developing an offering that we call a popup insights booth. So we would pop up at retail locations and talk to people where there was a lot of foot traffic [Laughter] and have very quick qualitative conversations. So glad I spent so much time on that last year. So we had sort of a moment this spring about what are we going to do about that, are we just going to drop it, are we going to figure out an alternative solution. So we are actually in beta test right now of doing that digitally, of offering a virtual room that people can pop in to, give us a few minutes of feedback, go on about their day.

It's trickier than standing in a mall and a kiosk, I will say that, but I think that's what we're seeing a lot of, people making a decision of how can I get to the same endpoint creatively, how can I deliver the same kinds of insights that our clients



need, that the brand needs, that decision-makers need in the constraints that we're in. So that's something we've all known, that constraint breeds creativity and I think that's what we're seeing right now. We're seeing a lot from a tool and platform perspective, from brand perspective, agency perspective, as people are trying to get to the same endpoint through new creative means. Perhaps a silver lining, right, that we're all kind of thinking in new ways and developing new ideas right now.

Gregg Archibald: That's accelerated a lot of change that's been happening in the industry for a while. I'm not sure that we're really seeing a lot new but the change, the speed of the change has been probably the newest and most significant component to that. So Peter, what's different about you today than it was a few months ago? **How are you adapting personally to make sure that you're focused in being able to do the things that you need to and move forward?**

Peter Milla: Yes, sure. I'm fortunate in that I've been busier than ever, lucky the clients that I have and one main client is very busy. So me, it's about making sure I work to get all the work done. A lot of things that are high priority are probably even higher priority. The companies are moving on opportunities very quickly in terms of if there's an opportunity here, let's not wait, let's make sure we get this done, this prep work done, etcetera. For the compliance work that I do, CCPA is here. Its enforcement went into effect this month but the attorney general in California, despite the fact that he says that they're going to enforce, there's really no money to enforce.

An outcome I do see coming out of the economic reality is that as many as 15 of the states were proposing laws and regulations like the California Consumer Protection Act, which I think quite honestly is going to go on the back burner



because states are worried about not hampering business, etcetera. Although California has the CRPA which is a new data protection and privacy law on the ballot in November which would actually makes CCPA have more GDPR-like components even. So I don't know what is going to happen. The other thing you guys probably see about privacy is that there might actually be in the US more of a tolerance for less personal protections in the interest of controlling the pandemic. So I'm in a different kind of position where I've been busy but that's just really a client mix from my end I think.

Gregg Archibald: Glenn, what about you? **How are you managing your day in the life differently than you were to keep sanity and progress in the forefront?**

Glenn Kessler: Well, one business thing and one personal thing. First, the business thing, we've been doing more meetings than we had when we were altogether. That's because the benefits of walking around and talking to people at will are gone. So we're doing Zoom meetings every 10 days and smaller meetings more frequently than we did before. On a personal note, since no one's at the office and no one has to show their face to show that they're at the office including me, I'm 67, I have four grandchildren, I now work from their houses when I can. I'm going to do that this afternoon. Whereas before, I felt like a work ethic, I got to show I'm here all the time. But now, I can't be here all the time. There's no value in it. So I'm working from wherever I am and it's going just fine.

Gregg Archibald: So I was talking to a friend that runs a business in Boston and he's originally from – I'm going to get this wrong, it's either Switzerland or Sweden. I think it's Sweden but I'm sure he's going to slap me if he hears this. He said "We're moving back." I said "Why?" He says, "The pandemic showed me that I don't need to be here. I



thought I needed to be here but I don't. So we're moving back home." It's really enlightening and liberating to learn that you can work from the grandkids'.

Glenn Kessler: Yes.

Gregg Archibald: So that's very cool, Glenn. Very cool. Ron, what about you?

Ron Gailey: One of the things that we have done that hasn't been mentioned here but we have done outreach to all of our prospects and our former clients and try to speak with them all. There was a temptation to reach out to them less and to give them space but now, we're actually reaching out to them more. I'm trying to speak with everyone and find out how they're doing through this pandemic and doing this personal outreach and talking to them and we have meetings that go absolutely nowhere but we had connected once again with someone and we have a lot of them that have surprisingly something important has come up that they needed and we called, right? So I would say our marketing efforts have become much more personal, but Zoom to Zoom, and they have become much more – I don't know, we're more outgoing to speak with people to find out how they're doing. I haven't found anybody that hasn't appreciated it. Some couldn't for whatever their reasons are but most of them are very grateful for the outreach.

I think a lot of them are not speaking to people much. Really, in truth, in business, who's going to call them, right? So we are. Anyway, I've noticed that to be a positive move for us and it's actually brought joy to my life to speak to these people. Some of them I haven't seen them for a while, and to connect with old associates, people that we have been asking for their business for a while but nothing has come up and now suddenly something is. So it's been good.



Gregg Archibald: Yes. I personally have been taking calls from people selling home insurance or extended car warranties. [Laughter]

Ron Gailey: We've actually asked some to go to lunch. If they're nearby, "Hey, let's go" and we'll meet somewhere. The tables are six-feet apart and we're doing the yard lunch or whatever but they've been glad frankly to get out a little bit and do something.

Katrina Noelle: I think there's so much of a need for human connection right now. I've said this in a number of different forums this spring but if we're in the business of understanding people and helping make empathetic connections, then this is the time to do that, right? I mean we're seeing it from participants as well as clients. I'm totally with you, Ron. This is the time to talk to your clients. It's also people are hungry to give feedback, to be heard, to talk about something other than the pandemic. Hours have been reduced, unemployment is what it is. So people are very willing to take part in research right now for multiple reasons. We're getting the best show rates we've had in years, right?

Ron Gailey: I'm with you. Actually, when the pandemic kicked off, across all of the Latin American countries that we serve, we did a COVID-19 study. We didn't charge anybody anything for it. So we just did this study. It cost us a reasonable amount to do the study but we immediately shared this is where your country is at, here's how Peru is versus Panama versus Costa Rica versus Trinidad. They all knew they were in the same boat together. Then we shared it, we had Zoom calls with them and we're sharing it with them and their team. We give them a month later and they were glad to know, because they were very insulated and trying to react to what it is, it was helpful to see the larger picture for them. I think it actually saved a lot of our business with them to be proactive on our part, to do something that they didn't pay for, we did. It's good for them.





Katrina Noelle: Yes, that's a big trend, right? I mean most businesses I know have done some self-funded work in the past quarter, some study on – because we're researchers, we're curious. So if our clients aren't keeping us busy, we're still curious people.

Ron Gailey: The world, yes.

Katrina Noelle: Exactly, yes. We have the same experience.

Gregg Archibald: So we've talked a little bit around this idea of when things become stable. Katrina, I think you mentioned it once and who knows when there'll be some consistency or we think there might be some consistency in consumer behavior, attitudes, or values or whatever that may be. I'm just going to pick a date in the future and I'm going to pick 15 months. There's a rationale behind it but I'm way likely to be wrong. This 15-month date in the future is there's going to be some stability that we're working towards, okay? So at this point, what are the opportunities for the research industry to have more influence, more vision, more – I started to say power, that's not the word I'm looking at, more direction, offering more direction than it has, than we can do today because it's kind of smaller pieces and then we don't know where anything is going. **So what does the research industry need to be or do or do differently 15 months in the future than what we were doing 15 months ago?** I'm going to start with Ron. That was because his name starts with an R, so there you go.

Ron Gailey: It's a really interesting question and I'm not sure that I'm going to have a real profound answer for you but I'll give a shot at it. I think that the efforts right now to be very, very involved in today and helping people through the weeks, the months, and the current problems that they're having now is building a trusted relationship that was different before. So before, it was definitely client-supplier



kind of and we work with people and we were friends and we did stuff but the need was different. Right now, the need is actually it's a survival need. It's a revision need because they are trying to become more efficient themselves or do the right thing themselves and they need to do more with less. So all of the things that we're doing to be thoughtful and helpful to them now I think are practices that frankly ought to be always in place. It requires a lot more outgoing effort on our part and outreach and trying to help and frankly being partners and friends rather than a business who serves them kind of a thing, right? It requires a different attitude. I think that they're going to appreciate that and lean towards supplies who are more that way in the future, right?

Gregg Archibald: Sorry, go ahead.

Ron Gailey: No. So I see change moving toward partners who are outgoing during a challenging time rather than those who just are kind of the same as always before, right? I think it will shape smaller businesses, I think businesses will have more of an advantage. We are all working remotely anyway, most of us, you know what I mean, in boutique businesses. I think that the larger businesses are going to have a bit of a challenge to adjust to the timeframe that we're in because I think it will be a bit different.

Gregg Archibald: Glenn, **do you see that any differently if I say what might be from now versus what we were 15 months ago?**

Glenn Kessler: Well, when demand is low as it is now, the tendency is to be an expert at whatever the client says they need and then try to figure out how to get it done. That again is a function of demand. But I think A, if there are fewer companies in the business due to attrition and since to me the biggest change in the consumer area relates to



channels of distribution, it's trying to find some ways to adjust research to the change in channels of distribution. So for example, we do aisle testing and package testing and so on but the needs to get a package recognized as someone's walking down the aisle and trying to get it prominent when someone is using an Amazon or Walmart online, completely different. So it's a great chance to innovate and take some of the business that some of the large companies that focus on methods as opposed to on problems, find a way to meet the problems - I haven't come up with the new channels of distribution but I think it'll be very busy because smaller brands that aren't prominent on television are going to have – or when they're out of the retail, they're going to have to get attention someplace else. It I think could be a completely new opportunity.

Gregg Archibald: Peter, what about you, 15 months ago compared to 15 months from now?

Peter Milla: Yes. So if we're assuming that in this 15 months, this is under control, nobody knows what that is but there might be a virus...

Gregg Archibald: A magic number.

Peter Milla: There might be a vaccination, there may be other treatments. So I think that following up what Ron said, I think smaller companies, it's going to be an opportunity for them - research services. The larger companies that have research services, they naturally want to scale, they want to standardize services, and the customer is going to get served by a more mid-level person. If you're dealing with a smaller entity, you're likely to deal with the owner-operator. The ones that do that well in building these relationships certainly for several years after that 15 months could do very well. The pressures will be back on cost and automation. I see for technology-oriented companies, it will probably be the other way because



the ones that can get larger and can automate and can standardize, they can deliver consistent services, more better services, more products to market where it might be a different kind of story. It might be hard for a small tech play to come out and to break into things and the ones that will be successful will really have that sort of research service component where you can mix the personal relationship with the technology that you're offering.

Gregg Archibald: Katrina, we're going to leave the best for the last.

Katrina Noelle: No pressure at all. No, I think the momentum that we have right now in being innovative and solving problems in smaller chunks should not necessarily go away. I mean I do think that there was the illusion of control and the illusion of predictability before and that just has been shattered a little bit. It's not like we could ever really know what a consumer would do six months in the future. It just felt more stable. So I think now we've just sort of gotten a little bit of a shakeup on it is important for insights to be integral in the organization because the world is a shifting, moving place. I think this is both agency side, client side, all across the board. I think hopefully in 15 months, people will recognize that you cannot do a study June of one year and rely on those insights for the next year and just assume everything is going to plod along and fit into those personas and go on the trajectory that you've set out. This is an ever-moving world.

So I think in terms of getting a seat at the table or being important in decision-making, I think it is about being integrated all along the way, of having solutions to be able to tap into what consumers are feeling, wanting, needing at any point in time and being able to do that a little bit more flexibly. I think there have been some good points made about does it matter what size the firm is, does it matter what the priorities of the organization are. I think there's no reason to stop



innovating and stop listening. I think brands will be stronger if the insights are stronger and more, God forbid we use the term again, agile, in that 15 months and beyond. I don't know why I keep saying 16. Apparently, that's my prediction is 16 months, not 15.

Ron Gailey: You're an even number person.

Gregg Archibald: I'm sticking with 15. I don't want to go to 16. So thank you for that. I've been a part of most of these roundtables as we've gone through the weeks. I think I've missed one or two. I think what I've heard here today is that the theme of relationships whether that be with your clients, with your employees, personal respondents looking for it, that relationships are in some way more important and being deeper and more connected. That's probably, I picked up on that throughout several little pieces of conversation from everyone in some way, shape, or form. It seems like that is more than a band-aid, that maybe 14 weeks in, we've recognized that this is the healing place. So I don't know, I'm just making that up but it just felt very optimistic with a little bit of a prescription. So I want to thank everybody here for their time, their insight. This has been fantastic. On behalf of Gen2 Advisors, on behalf of GreenBook, and on behalf of Lenny Murphy who wishes he could be here but family vacation, just overwhelming. So thank you all for participating.