



# Strategic Partnerships

## Strategic CX Questions

# Nice to Meet You!



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Who We Are

# About Us

CMI is not your average research firm. What sets us apart? **It all comes down to who we are and how we work ...**

At CMI, we believe in research that **empowers clients to thrive.**

We are a diverse, passionately **curious team** that never stops seeking answers.

We are the **innovative partners** invested in your success.

We understand that no two businesses are the same and **one solution doesn't fit all.**

That's why we're tremendously flexible—we **tailor our solutions** to meet your unique needs.

Obsessed with possibilities, we continually find new ways to make research more interesting, efficient and relevant—and we tap into the **latest technology and tools** to get the job done right.

To put it quite simply, we're people who are **passionate about research** and the work we do uniquely for you.



# We Are Experts in Our Field

CMI is your research and data enablement partner that develops strategies and innovations to power top Fortune 500 companies. Our world-class research drives results. For more than 30 years, CMI has been raising the bar for the research field. With our deep industry expertise, we specialize in inspiring ideas and building brands that matter.

**30+**

## **YEARS EXPERIENCE**

In custom market research, advanced analytics and insights

**12M+**

## **SURVEYS**

Administered on an annual basis

**10+**

## **INDUSTRIES**

Spanning pharma, healthcare, insurance, food/meal service, CPG, advertising agencies, travel, telecom, financial services, and more

# Why We Have Long Standing Clients



## Customized to Client Needs

We customize all solutions, reports, and even CMI team structures to the client needs



## Economies of Scale

As accounts grow, CMI can build economies of scale. Thus, enabling our clients to reduce overall costs and get more in the process.



## Dedicated Staff

We meticulously consider and assign staff to client accounts, pairing needs and skills. As the account grows, CMI assigns staff members to be dedicated to such accounts.



## Deep Knowledge

CMI's account team dedicates significant time to understand each client and developing a deep understanding of the needs as well as company intricacies.





Health Partners Plans



SEPHORA



# We really know how to support brands.

We bring the latest thinking to all our work, we have 30 years experience in bringing brands to market.

Insurance  
Telecom  
Pharma  
Healthcare  
Financial Services  
Advertising  
Agencies



# Allstate



Tanezumab



# CMI's Approach to Strategic Questions



- As research consultants, CMI takes a collaborative, partnering approach to working with clients on strategic questions and needs. Each situation is unique, but our general process always starts with seeking to understand.
- We draw on our years of experience as a senior staff across clients and with your brand specifically to generate possible answers and/or solutions.
- The final steps include a review of our thinking with you and your team; this allows us to identify follow-up questions that may be necessary to address for a complete response. Finally, we will package our answer(s) and/or solution options for you.

# CMI Strategic CX Questions





# Your Leadership Advisors



**Brooke Shafer**  
PRESIDENT

Brooke is a veteran executive that has extensive experience both on the client and supplier sides. Prior to her current role as President and CEO of CMI, Brooke was the youngest executive in AT&T's history. Leading the AT&T Postpaid wireless subscriber base of 63M lines. Brooke oversaw the loyalty, churn, pricing and promotion departments for wireless consumer base, loyalty call center of +4K agents and retail support for all VPGMs. Her portfolio represented 60% of the total company's EBIDTA. Prior to overseeing the Postpaid Wireless Subscribers, Brooke was Chief of Staff to the President of AT&T and DirectTV consumer product and services. Prior to this, Brooke built and lead the Advertising and Retail insights department. Prior to Brooke's time at AT&T, Brooke developed and launched the Best Places to Work methodology as well as the widely used EEM (Employee Engagement Model).

Brooke sits on the NSBA Leadership Council as well as Technology & Data and Economic Advisory Boards. She also is a board member of KECTIL, a non-profit for youth in developing countries. Brooke has her BS in Psychology from the University of Georgia and her Master's in Marketing Research from the University of Georgia.



**Laura Caraway**  
SVP, CLIENT OPERATIONS

Laura oversees operations at CMI, ensuring that that each project is conducted to the highest standards. Armed with 20+ years of marketing research experience, Laura has a gift for transforming complex results into meaningful stories. She employs a variety of methodologies to help stakeholders better understand their customers and identify unmet needs, improve products and services, optimize messaging and enhance the customer experience. Laura specializes in a wide range of service industries, including financial services, food service, hotel and travel, telecommunications, healthcare and utilities. She is committed to quality, efficiency and consistency in everything she does—from the projects she designs and executes to her role as CMI's operations leader. Laura also serves on CMI's Steering Committee, playing an integral role in determining the direction of the company.

Before joining CMI, Laura held several market research positions at prominent organizations, including a global pharmaceutical company. She holds an MBA from the University of North Carolina at Chapel Hill and a BS in Marketing from Boston College.



**Brian Lunde**  
SVP, CLIENT ENGAGEMENT

Brian is a market research and insights veteran with more than 30 years of experience. A seasoned research consultant, he is passionate about using research and analytics to help clients to create, sustain and grow profitable customer relationships. He entered the field of customer satisfaction measurement in the 1980s as it was first emerging as a distinct research discipline. Over the years, he has built upon his core competency in customer experience insights and refined his skills in a broad array of research methodologies, including choice modeling and segmentation. Brian's industry expertise includes professional services, manufacturing and public utilities, with a special focus on financial services.

Before joining CMI in 2013, Brian led customer loyalty teams at several major market research companies. He has been published in the American Marketing Association's former Marketing Management Journal and is an active member of the Customer Experience Professionals Association (CXPA), holding the CCXP credential.

Brian holds an MBA in Management from the University of California – Berkeley and a BBA in Information Systems from the University of Wisconsin in Madison.



**Brian Lunde**  
SVP, INFORMATION SCIENCES

Serap leads the Information Science division of CMI Research. The Information Science division is responsible for all phases of advanced data analytics using a wide range industry leading techniques. Serap brings the rare perceptiveness to all her solutioning of advanced analytics, data mining, and creative story telling. Serap is at the forefront of the marketing research industry for AI and big data advanced analytics. She is passionate about creating actionable analytic solutions that, while complex to build, are simple in their interpretation and client execution.

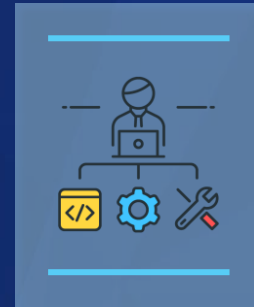
Serap holds a MS degree with a concentration in Marketing from Georgia State University and a BS degree in Management Engineering from Istanbul Technical University.

# Guiding Principles



## Senior Leadership

Because CMI promotes a collaborative learning environment, when you work with CMI, you benefit not only from the expertise from your project team but also from the collective experiences of our senior staff.



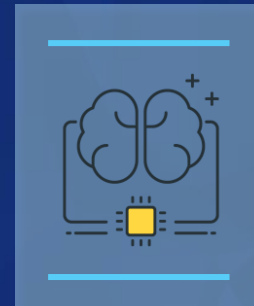
## Subject Matter Experts

We bring the proper subject matter experts to every conversation. When you work with us, your bench strength is deep and vast, supporting all your business needs.



## Collaboration

Because we are a culture of true collaboration, we constantly cross-pollinate our discoveries across the various industries we serve.



## Project Excellence

We believe one difference between “good” projects and “great” ones are the bookends. Upfront thinking & strategy prior to diving into your project, as well as learning & action at the end, turn a good project into a great one.

