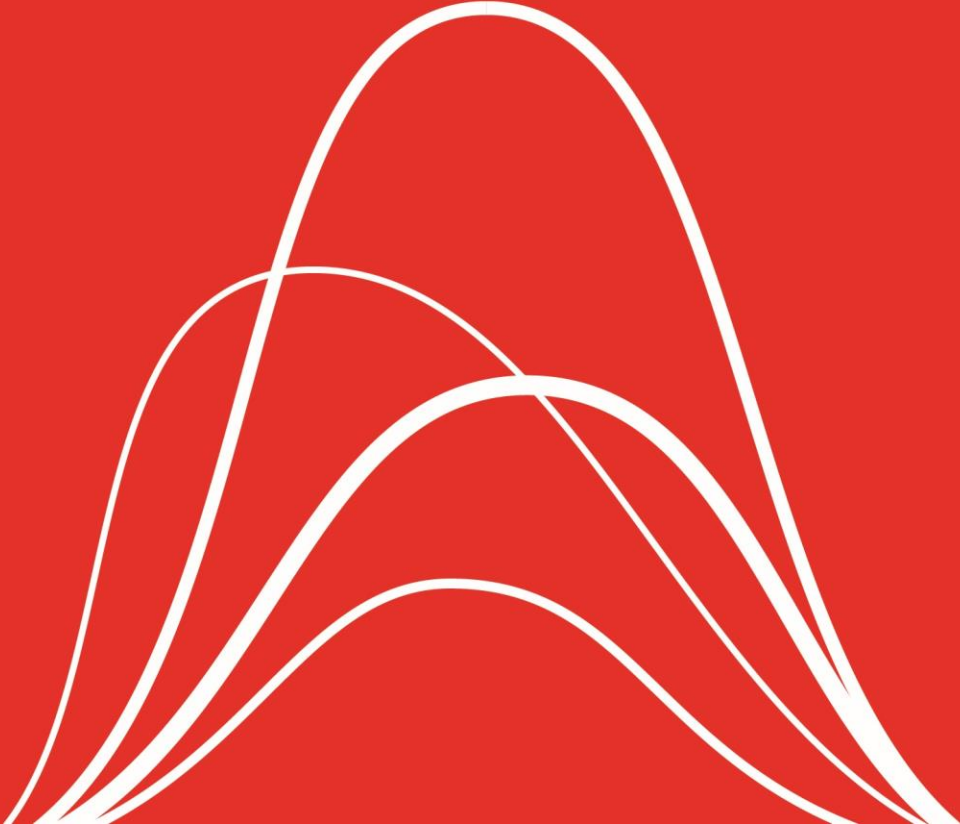


# Welcome to Research Narrative.

2024 Company Overview



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# About Research Narrative



## Learn about our...

- Story
- Superpower
- Mission
- Core Values
- Specialty areas
- Commitment to equity





# Our Story.

Research Narrative is a full-service strategy and insights agency specializing in organizations facing transition. Our practice is rooted in the belief that

**research is business storytelling.**

We've collaborated with writers, directors, producers, and programmers, and we believe that story is just as important to research and business professionals as it is to entertainers.

Our job is to find the story in data – and communicate that meaning through compelling narrative that turns insights into

**a strategy and action plan.**

Founded in 2011, Research Narrative is a certified Woman Owned Small Business (WOSB) and Women's Business Enterprise (WBE).





# Our Superpower

“There is no task too complex for Research Narrative to solve.”

-Research Narrative client



# We create clarity out of complexity.





## Our Superpower: Creating Clarity out of Complexity to Navigate Transition

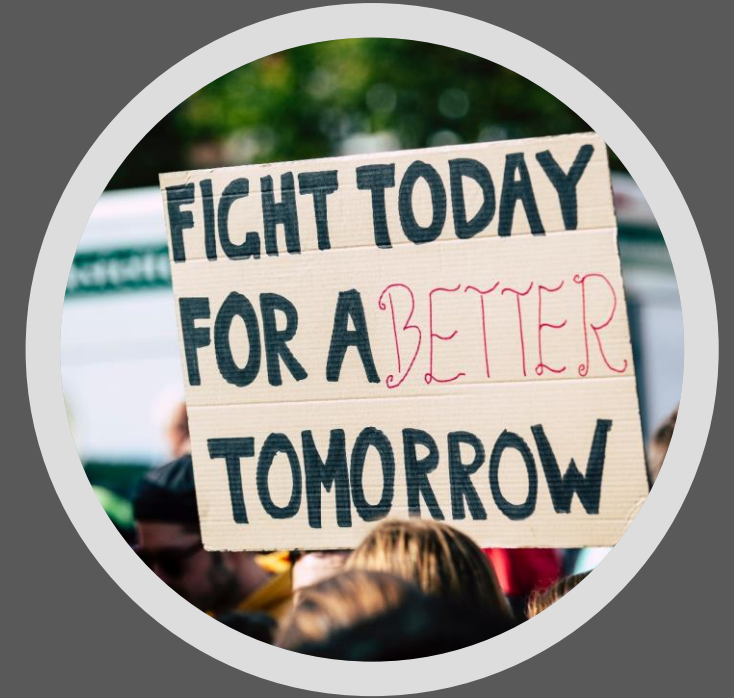
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**Hi, we're Research Narrative, and we're pleased to meet you.** We founded Research Narrative to address an emerging issue in business – an onslaught of data being fire-hosed throughout companies without clear business insight or strategic impact. Our superpower is creating clarity out of that complexity, so that organizations can see a path toward the future and feel confident in their choices. We've served a wide range of prestigious commercial clients like Verizon, YouTube, Amazon Studios, and Netflix, alongside both large and niche organizations in public media – including NPR, WNYC, WNET, WHYY, KQED, WDAV and Koahnic Broadcast Corp. And we've developed a certain expertise that permeates today's media landscape: **navigating organizations through transformative change.**

Today's public media industry is deep into a transition from a broadcast-exclusive ecosystem to a multiplatform system. **We call this the multiverse** – but not the kind you'll find at Marvel. The future of public media is **multi-platform, multi-cultural**, and ultimately, **multi-dimensional**. Sustainability means understanding and meeting the needs of an increasingly diverse audience and workforce, across a wider range of platforms, harnessing new revenue and business models to complement existing ones.

Whether you're building a new foundation, exploring future opportunities, or harnessing audience insights to develop an action plan, we'd be honored to help guide that journey.





**Our Philosophy:**  
Rigorous Insights, Meaningful Strategic Impact, and Social Good

**Our Mission:**  
Give You the Confidence to (Re)Imagine and Take Action



# Our Core Values



## Love of Learning

As researchers, we love to learn. In fact, we're in the business of learning! And we'll help you learn too.



## Meaningful Impact

We seek meaningful impact from our work, whether it's improving organizational outcomes or elevating our industry through investments in topics like Data Privacy and Racial Equity.



## Abundant Integrity

We're fiercely ethical. We care deeply about data quality. And we won't compromise our values to make money. We want our clients to be in good company with one another and trust our standards.



## Creative Resourcefulness

When tackling a new project, we don't think to ourselves, "Can we do this?" We think instead, "How can we do this?"



## Trusted Friendship

We strive for workplace relationships that feel like that of a close friend – relationships that are not only reciprocally fun and joyful, but also trusting and reliable. Consider us your workplace BFF.

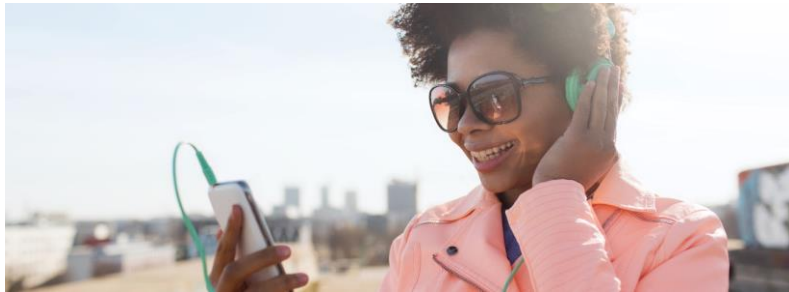




# Our Specialty Areas



**Entertainment and Media:** From streaming services to TV networks to public media, we're experts at understanding the insights and opportunities for a diverse range of audiences.



**Mobile & Wireless:** Whether it's building the consumer insights infrastructure for a new wireless company, developing a podcast strategy, or evaluating emerging models in mobile video, we know mobile.



**Marketing Communications:** Entertainers aren't the only ones tasked with telling stories; marketing and communications professionals are too. From brand advertising to public health messaging, we help you evaluate the efficacy and optimize the impact of marcom efforts.



**Education & EdTech:** Our team members have run a school board, taught at universities, and mentored students for higher education. We understand that the future of education requires both foundation and innovation.



**Digital Media & Technology:** Questions like "What is the future of media" and "How will consumers integrate new technological innovations like AI into their lives?" don't scare us; they inspire us.

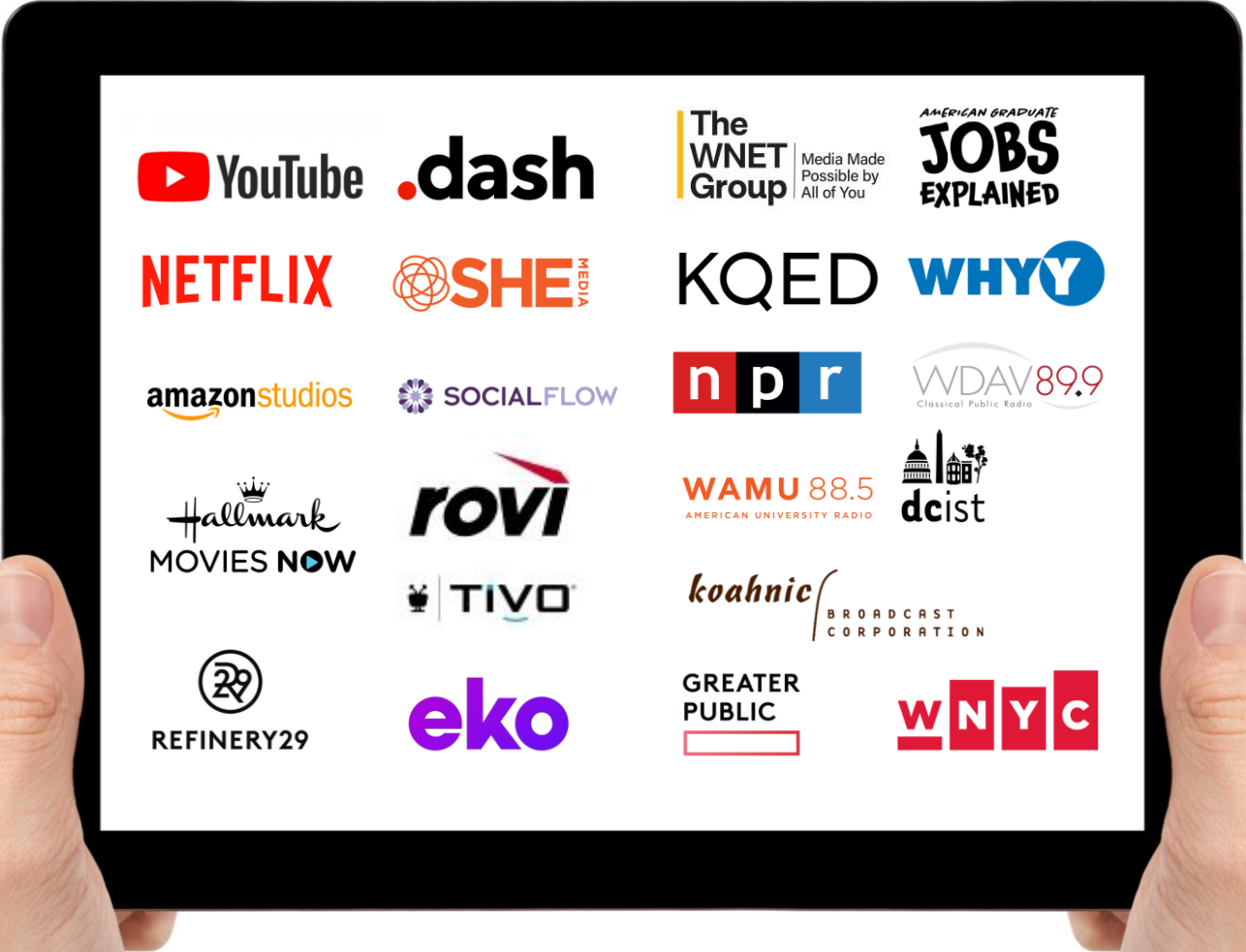


**Media & Social Impact:** Some projects look for Return on Investment, while others focus on Return on Impact. Our evaluative programs and frameworks allow mission-driven organizations to strategically plan and measure both.





# A Sampling of Our Clients



*"As always, your **commitment to partnership is superb.** You have been an impartial observer as well as clearly rooting for things to succeed! **Thank you.**"*

- Project Director, The WNET Group



# Our Public Media Experience

The origin story of Research Narrative is in fact rooted in public media: WNYC was our very first client, and NPR soon followed. Since then, our work in the public media ecosystem at Research Narrative continues to cover all platforms, and both national organizations and local stations. Some of our key projects include:

- Audience growth strategy, on-air talent cultivation, brand positioning, audience journey, audience diversity, and news podcast research and advisory for NPR
- Audience growth and community engagement research + strategic planning for WHYY
- Local programming research and strategy for WAMU
- Multicultural research design advisory and podcast concept testing for KQED
- Brand and programming strategy research & analysis for WNYC
- Strategic planning and audience intercept research for Koahnic Broadcast Corp. (in collaboration with Strategic Arc)
- Program evaluation and social video advisory for American Graduate: Jobs Explained (via WNET, in collaboration with CPB and 10 station partners)







## Our Commitment to Equity, Diversity, and Inclusion: The Multicultural Insights Collective

Co-founded and organized by Research Narrative, The Multicultural Insights Collective is a partnership with veteran researchers from different racial, generational, and geographic backgrounds, who collaborate with us on large-scale multicultural research initiatives:

- **Voices of Equity:** A series of consortia studies on topics related to diversity, equity, inclusion, and representation ([www.voicesofequity.com](http://www.voicesofequity.com))
- **Custom Research:** Bespoke studies focused on addressing the unique perspectives, needs, and opportunities in under-represented and underserved communities
- **Insights Advisory:** Expert consulting on representation in insights design, analysis, and activation




# Our Services



Solve Problems.  
Conquer Opportunity.  
Embrace Change.  
**Make an Impact.**

## Got data?

Whether you have too much or not enough data to inform your organization's needs, **Research Narrative** offers a range of creative and innovative services that **turn data into meaningful and actionable insight.**









# Services: Custom Original Market Research

**Actionable insights start with quality data.** From the exploration of ethnographies to the validation of online surveys to the predictive models of data science, we draw from a vast tool kit of trusted qualitative and quantitative methodologies, matching the questions you ask with the best methods to answer those questions.

## AREAS OF EXPERTISE

- Communication Strategy
- Brand Strategy
- Market Positioning
- Consumer/Audience Segmentation
- Content & Concept Evaluation
- Content Strategy—TV, Radio, Web/Online
- Value Proposition
- Talent Evaluation (On-air Personalities)
- Ad Testing/Ad Effectiveness/Brand Lift
- Messaging Effectiveness & Optimization (Including Copy Testing)
- User Experience & Product Development
- Multicultural Insights
- Impact Evaluation



## METHODOLOGIES IN OUR TOOL KIT

### Quantitative Methods

- Online & Mobile Surveys
- Phone Surveys
- Dial Testing (Online & Live)
- Digital/Social Analytics
- Social Listening/NLP
- Eye Tracking & Facial Recognition
- Coded Open-end Assessment

### Qualitative Methods

- In-Person and Online Focus Groups
- In-depth-interviews (IDIs)
- In-person and Digital Ethnographies
- Digital Diaries and Message Board Forums
- Moderated Usability

### Hybrid methods

- Digital Anthropologies
- UX Sessions



## Services: Strategic Advisory & Strategic Planning

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In today's world, organizational change often takes place at a rapid-fire pace. The need for data-driven insights and strategic planning may not be able to wait until you can hire a full-time research or analytics team — or that need might be temporary.

Our team can collaborate with you to **establish or improve your research infrastructure**, **lead research teams through transition periods**, **extend your insights bandwidth**, and **build a consumer insights practice from scratch**. We can even turn your insights into a fully baked **strategic plan**.

### SAMPLE ENGAGEMENTS

- » Secondary analysis, internal in-depth interviews, and workshop facilitation to lead a public media organization through a 3-5 year strategic planning process
- » Building and shaping an internal consumer insights practice for a mobile startup
- » Managing brand lift projects and workflow for an online publisher
- » Developing data-driven thought leadership narratives for a media tech company
- » Team training and consumer insights road-mapping for a digital media company
- » Trends analysis to inform the production strategy of a streaming video service
- » Research library review to distill audience growth priorities for an established news outlet





# Our Strategic Planning Process

Our strategic planning process begins with intake and builds toward a final deliverable. Between each stage, we debrief on insights and work together to plan for the next stage. We provide biweekly check-ins throughout this strategic planning process, to ensure streamlined planning and communication.



*\*Intake may include secondary research & data analysis, original audience research, employee survey, and / or executive and board interviews.*



# Introducing Strategic Arc, Our Key Strategic Planning Partner

Strategic Arc Limited is a veteran and minority-owned consultancy that provides strategic consulting services for organizations and non-profit institutions in the healthcare, media, and financial sectors. A close partner of Research Narrative, they specialize in facilitating strategic planning: from vision and mission development to goal conception and operational planning. They also develop strategic marketing plans that include digital and content initiatives and help organizations complete transformational change management projects in diversity, equity, and inclusion.



PARTNERSHIP FOR STRATEGIC PLANNING & ORGANIZATIONAL SUSTAINABILITY

## THE POWER OF BOTH

### SYNERGY COMES STANDARD

Two organizations with a rich history in public media collaboration have joined forces. Strategic Arc and Research Narrative have teamed up to bring a powerful combination of audience insight, marketing, and strategic planning services that will increase your operational and long-term stability.

### WE'VE GOT YOU COVERED

We've got what it takes to help your organization thrive in a challenging environment. From strategic planning services and in-depth research, to DEIB (Diversity, Equity, Inclusion and Belonging) studies, we have the expertise you need.

### CUSTOM SOLUTIONS

Stay ahead in a consistently evolving media landscape. Our goal is to help you find success and stay ahead of the curve, no matter what you might be faced with. We're here to help craft custom solutions that make sense for your team and budget.

## GAIN PERSPECTIVE

### MEDIA EXPERTISE

With decades of combined experience working with public media organizations, our team is anxious to help jump-start your next program, initiative or strategic planning session. We provide the tools, resources, and planning frameworks to help you stay at the forefront of current trends and industry technologies.

### DEEPER PERSPECTIVE

Strategic Arc is a veteran and black-owned business and Research Narrative is a woman-owned business. When you work with Strategic Arc Limited and Research Narrative, you'll find that we're deeply passionate about helping public media organizations succeed in an evolving landscape. You'll get not only our passion, but you'll be sure to benefit from our years of unique experience, perspective, and thought leadership as minority and female-run businesses ourselves.



Working with Strategic Arc Limited and Research Narrative was a great choice! They took the time to help us ensure that our entire strategic planning process was well thought out. We wanted to reengage with our community and to ensure that diversity and inclusion were at the forefront of our outcomes. I'm so excited by our new strategic plan!

-Frank Dominguez - WDAV Public Media, Davidson, NC



# Services: Media Impact & Evaluation

Are you telling a story to **inspire change** and **make an impact**?  
Is your organization endeavoring to use media to generate awareness and action toward a cause you care about?

Our evaluation system isn't a report card; rather, it was built to help mission-driven storytellers and organizations to continuously learn and iterate toward success. We'll work with your organization to maximize impact by:

- Developing a goals-based strategy with associated KPIs, measurement planning, and audience insights integration
- Evaluating content resonance and message effectiveness with target audiences
- Aligning production, marketing, and engagement activities with desired, measurable outcomes
- Providing defensible information on a **media project's impact** - to investors, funders, and partners.
- Highlighting opportunities for internal process improvements that can heighten impact

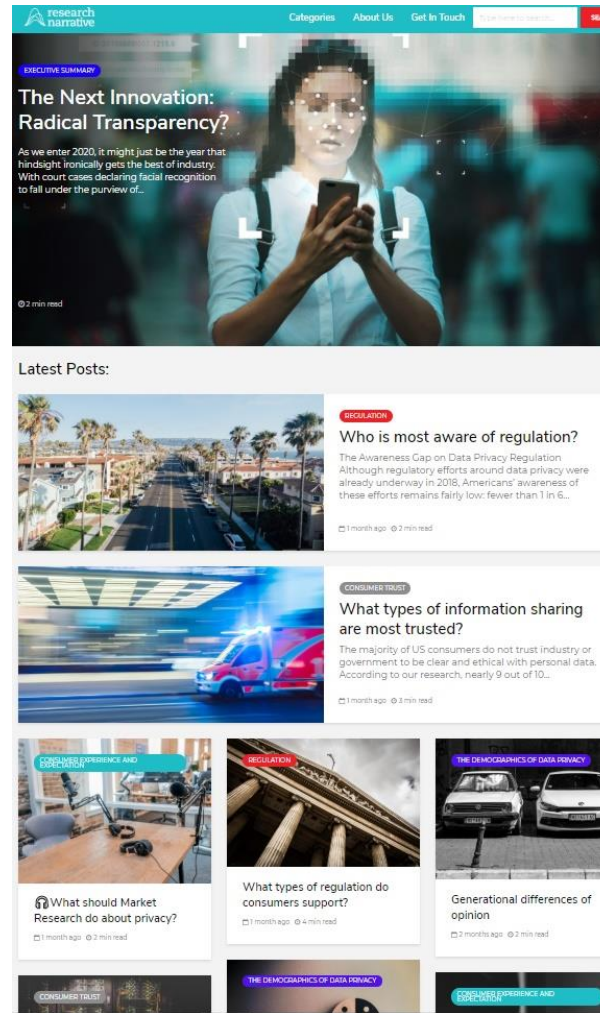




# Services: Data Journalism

Do you already have data, but not the bandwidth or expertise to make sense of it and translate data into meaning, strategy, or action?

That's where we come in. Our team will work with you to organize and analyze data, **distilling the insights into a compelling and actionable narrative**. Think of us as your data journalists—explorers, analysts, and storytellers all in one. Whether it's e-books, articles, podcasts, mini-briefs, digital dashboards, web content, or webinars, we've got you covered.







# Services: Workshops and Coaching for Data Storytellers

## Our Story Insights Suite



Today's researchers aren't just expected to be analysts. We're also expected to be **business advisors and consumer experts**. More importantly, we're expected to have a **point of view**, and that requires a keen understanding of the **business and organizational context**.

### What's in our “**SI Suite**™?”

- “Think Like a Storyteller” Leadership Workshops
- One-on-one and team coaching on topics like insights storytelling and data literacy
- Data-storytelling tools to craft and communicate clear business insights



# Meet the Research Narrative Team.

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## Who said rigorous researchers and thoughtful strategists can't also be fun?



Our dynamic team of seasoned researchers, analysts, storytellers, strategists, and facilitators spans a wide spectrum of skills – and a whole lot of creativity. We live in a complex, multidimensional world. And it takes a multidimensional team to tackle that.

Get to know us, and you'll find a playwright. A school board member. A rowing coach. An actress *and* an actor. Two non-profit fundraising experts. And even a Swedish game show winner.



When we ask our clients why they choose to work with us, they'll often broach important professional characteristics like personal integrity, research rigor, strategic thinking, narrative excellence, and subject matter expertise. But they'll also say that we're simply fun to work with. We pride ourselves on being all of the above.

So turn the page and get to know a bit about each of us...



# Kerry Edelstein

## President & Founder

**Kerry Edelstein is the President & Founder of Research Narrative.** An expert in creating data-driven stories that drive business and content strategy, Kerry has collaborated with renowned media and technology brands such as Netflix, Disney, Amazon, Discovery, NPR, SHEMedia, and YouTube to develop programming, launch cross-platform media strategies, and build leading brand portfolios. A vocal advocate for multicultural strategy and research design, she was awarded the Insights Association's "2023 IA Laureate" designation for her work in championing representation in research and launching the Multicultural Insights Collective.

### PREVIOUSLY

- Vice President of Research & Analytics for Joost Media
- Vice President of Research at media research and consulting firm SmithGeiger
- Co-founder of filmBUZZ, a market research firm serving the independent film community.
- Youth and Education division of Harris Interactive, collaborating with universities and educational service providers to identify opportunities to maximize student performance, satisfaction, and retention.

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### EDUCATION & OTHER FUN STUFF

Kerry previously served as Vice President of the Board of Directors for CHAMPS Charter High School, a media and performing arts high school in Los Angeles. She holds an MBA from The Anderson Graduate School of Management at UCLA and received her B.S. in Biometry and Statistics from Cornell University.

She moonlights as a hip hop dancer and dog mom to a manipulative Blue Heeler named Barleigh.





# Tracey Castle

## Managing Director & Moderator

**Tracey Castle joined Research Narrative in January 2016 as Managing Director.** Tracey brings her broad experience in the world of marketing, advertising, brand strategy and consumer insights. She is a market research master with a rare depth in both qualitative and quantitative research. Tracey is known for distinguishing between ordinary data and insights that are essential to the business. Tracey is an expert in Gen Z and Millennials.

### PREVIOUSLY

- Led consumer insights for kids' video game franchise, Skylanders (where toys come to life) at Activision.
- Lieberman Research Worldwide, working on both qualitative and quantitative studies, and ultimately running and reshaping the qualitative department.
- Held positions as senior account planner for advertising agencies TBWA/Chiat/Day and Team One Advertising



### EDUCATION & OTHER FUN STUFF

Tracey has a masters degree in Global Marketing and Advertising from Emerson College in Boston and a bachelor's degree in Creative Writing from San Diego State University in San Diego.

When not busy finding insights in data, she enjoys playing beach volleyball, doing Zumba and taking her dog Burt for walks.



Lisa Chen, Ph.D.

Senior Director, Strategy and Market Insights

**Lisa joined Research Narrative in June 2022 as Senior Director of Strategy and Market Insights**, after collaborating with Research Narrative as a facilitator and advisory board member of the Multicultural Insights Collective. With over 25 years of experience mining insights into human behavior, Lisa's developed expertise in research on generational interactions and diversity, equity, and inclusion issues. She seeks to uncover the nuances of the 21<sup>st</sup>-century "Experience Economy" where you don't just buy a cup of coffee, but you craft your custom beverage. The real story is embedded in the emergent experience. Lisa's work as a researcher and strategist is about revealing that story to clients and solving the disconnect between the end results and the means to how we got there.

## PREVIOUSLY

- › VP Market Services & Intelligence for Crux Research
- › Senior Director of Youth and Education Research at Harris Interactive
- › From her tenure at the Toronto-based think tank, Moxie Insight, and as a consultant for Noggin and Scholastic, Lisa has extensive knowledge in generational research; especially Gen Z, parenting, and children's issues.
- › As Assistant Director for Sesame Street Research, Lisa developed curriculum, revised scripts, and conducted formative and summative program and website research.

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## EDUCATION & OTHER FUN STUFF

Lisa held post-doctoral research positions at the University of Pennsylvania and Temple University. She earned her Ph.D. in Developmental Psychology from New York University and holds a B.S. in Nutrition and Human Development and Family Studies from Cornell University.

When not working, she enjoys paddle boarding, yoga, travel, and watching her kids play lacrosse.





# John Olson

## Research Manager and UX, UCD Specialist

**John is an audience, consumer, and user experience specialist.**

He blends storytelling mastery with creative development research to drive success for Media and Entertainment companies. He incorporates UX research and user-centered design methods to drive innovation for Tech, Telecom, and design teams.

A natural **interviewer, ethnographer, and focus group moderator**, John brings curiosity, empathy, and creativity to every engagement. He co-hosts the THINKerry podcast, he's a member of QRCA, and he loves a good challenge.

### PREVIOUSLY

- » John is an accomplished writer, dramatist, and storyteller. He has presented his plays, poetry, and fiction in NYC and many regional venues.
- » His career roots lie in providing Broadway, TV, and film production teams with story development, script editing, and iterative audience research.
- » He's worked with executives/creatives across the Entertainment spectrum: AMC, Discovery, Meter TV, R&D Theatricals, Pigasus Pictures, NPR.



### EDUCATION & OTHER FUN STUFF

Certified in Human Centered Design through Cornell University. BA in English, Theatre, and Psychology from Indiana University. Recipient of IU Theatre's 2006 Faculty Memorial Award.

Before the pandemic, he had a play headed for Broadway. Ironically, it was a play about a pandemic.

Formerly a semi-famous reality TV star. But only in Sweden. It's how he met his wife.



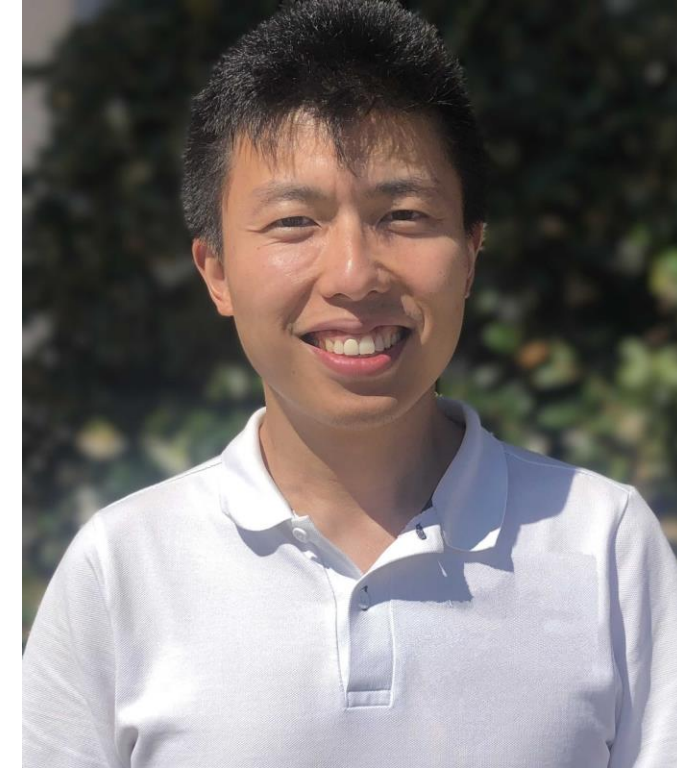
# Jack (Xinkang) Du

## Research Analyst

**Jack joins the company as Research Analyst, after completing the MBA program at UCLA Anderson School of Management and interning at Research Narrative for a year.** A population geneticist by training, Jack is enthusiastic about data science and using storytelling to make numbers come alive. As an ex-teacher and current EdTech entrepreneur, he has the expertise and a burning passion for education and the EdTech industry, making him the perfect candidate for developing strategies for EdTech clients.

### PREVIOUSLY

- Jack conducted oncology research on glioblastoma and quantitative genetics research in fishery science, developing molecular markers to reveal the evolutionary history of fish populations via statistical modelling.
- Jack was an application specialist at Becton & Dickinson (BD), and the manager of the information center at the 2014 Youth Olympic Games, before becoming a science teacher and starting the Chinese program at Paraparaumu College in New Zealand, where he taught for 5 years.
- Jack recently completed an MBA at UCLA Anderson School of Management and co-founded an EdTech startup developing an immersive language learning game named "Lost Abroad."

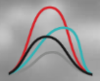


### EDUCATION & OTHER FUN STUFF

Jack grew up in China and moved to New Zealand at the age of 19. He holds a Bachelor of Biomedical Science and an Honors in Marine Biology from Victoria University of Wellington.

He obtained a diploma in teaching and taught science and Mandarin Chinese at a New Zealand high school for 5 years, before coming to UCLA to pursue an MBA.





# Abby Giancola

## Quantitative Analyst

**Abby recently joined the team as our Quantitative Analyst.** She comes to us from the world of academia with a background in neuroscience and social psychology. She has experience in a variety of research methodologies, project management, and data analysis. Simply put, Abby is interested in all things related to human behavior— she aims to investigate the “how” and “why” of people’s thoughts, emotions, attitudes, and motivations. She plans to use her background knowledge in the science of emotion to help our clients answer their research questions.

### PREVIOUSLY

- » As a research technician in the Interdisciplinary Affective Science Lab (IASL) at Northeastern University and Massachusetts General Hospital/Harvard Medical School, Abby worked on several projects such as examining the effects of hormones on brain connectivity, mood, and memory, and using Bayesian inference to model how emotions bias our judgments.
- » At the University at Buffalo, Abby completed her master's Thesis work on different types of meta-awareness (or being aware of one’s own thoughts and feelings) and their predictive utilities.



### EDUCATION & OTHER FUN STUFF

Abby is a dual citizen between Canada and the US. She earned her Bachelor of Science in Neurobiology and Behavior from Cornell University, and her Master of Arts in Social Psychology from the University at Buffalo.

In her free time, she can be found on the Charles River in Boston, MA, helping people learn the art of rowing— her love of the sport has only deepened over the past 15 years.



# Heather Ramos

## Business Operations Manager

**Heather Ramos is the Business Operations Manager for Research Narrative.** She is an avid, lifetime learner. Heather is naturally detail oriented, thrives on challenge, and loves working collaboratively—all factors that drive success in her role as business and operations manager. Her broad range of cultural, competitive, and entrepreneurial experiences—including as business founder, Division I athlete, traveler to 20+ countries — and her people-centric personality provide unique perspectives and advantages to the Research Narrative team.

### PREVIOUSLY

- › Heather's professional background spans entrepreneurship, business development, finance and accounting, sales and marketing, team management, and education
- › Owner and Director of Charlotte Latin & Kizomba Dance, which has served and mentored over 10,000 students and customers
- › Built an accounting and tax services franchise (Liberty Tax Service), where she served private and commercial clients, trained and managed a team, and ran sales/marketing
- › Licensed North Carolina real estate broker with a background in sales consulting, property leasing and management, contract negotiation, and lead generation



### EDUCATION & OTHER FUN STUFF

Heather's Division 1 College Soccer team at Elon University won the conference championship, and she competed in the NCAA Women's Soccer Championship, all while earning her degree in Business Administration—with a concentration in Management/International Management. She studied in Costa Rica and Ghana which inspired her to found Charlotte Latin & Kizomba Dance in 2007, an adult dance school based in Charlotte, NC. Heather feeds her creative outlet as a community organizer and educator in Latin and African music, dance, and culture. She's fascinated with design and organization and is always wearing different "hats," including as a wife and mother to an energetic 4-year-old.





# DaWayne Cleckley

President, Strategic Arc



**DaWayne Cleckley, President of Strategic Arc Limited**, is a consummate innovative change agent and entrepreneur with a proven track record in strategic planning, change management, marketing, broadcast, and digital media. He has completed work for organizations with both national and international clientele, such as Hanes Erie and the National Educational Telecommunications Association. In his previous roles as an adjunct professor at Erie Business School and Edinboro University, Mr. Cleckley taught Organizational Behavior, Human Resources, Visual Basic, and Television Practicum. In addition, DaWayne has consulted for organizations where he has helped build disruptive marketing opportunities and transformative community initiatives.

## PREVIOUSLY

- Vice President of Marketing & Community Development for PBS39
- Adjunct Professor at Edinboro University of Pennsylvania
- Marketing & Multimedia Manager at WQLN Public Media (Television Chief) where he developed a hybrid project management system used by multiple stations, which employed cross-trained, cross functional, and self-managed teams, while centralizing all aspects of multimedia production to provide streamlined messaging, brand management and content management across all platforms.



## EDUCATION & OTHER FUN STUFF

DaWayne - an Army Veteran - volunteers by serving on the Board of Directors for Sights for Hope, a nonprofit that provides skills, supports, and solutions that advance self-sufficiency for people with visual impairments. He loves to ride motorcycles and produce instrumental hip-hop and R&B music in his spare time.

DaWayne holds a B.S. in Management and is completing his Master of Public Administration.

Reimagine.  
Reconsider.  
Rethink.  
Reinvent.



Contact **Us.**

**Research Narrative, Inc.**

Kerry Edelstein, President and Founder

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