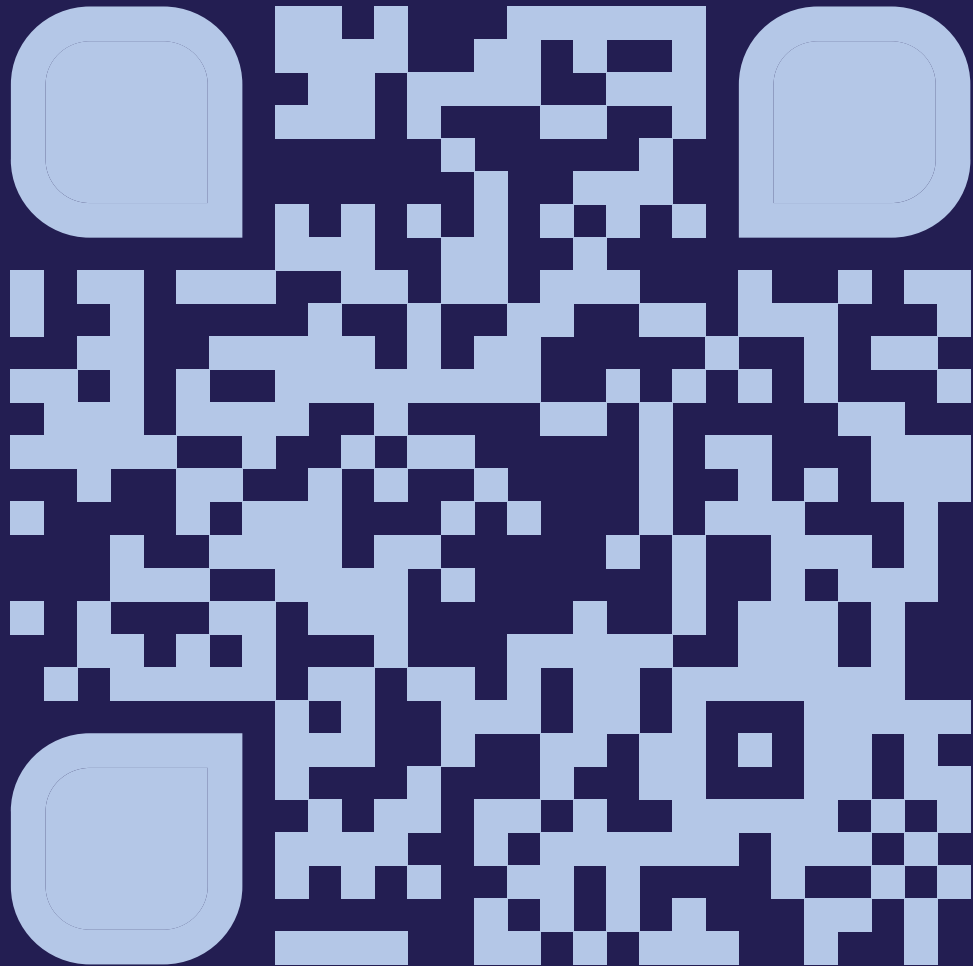


Test, Learn, Act

How Kearney Brings Real-Time Consumer Insight into Strategy



Minesh Parikh
Vice President
KEARNEY
PERLab



Eric Dolan
General Manager NA
belt



AGENDA

- 1 Our Partnership
- 2 How Bolt is Activated @ Kearney PERLab
- 3 Case Studies
- 4 Key Takeaways

THE PARTNERSHIP

Kearney PERLab + Bolt Insight

15+ Projects Together

6+ Categories

3+ Markets

1-3 days Typical Field Turnaround

KEARNEY PERLab

Product Experience and Renewal

- 100 years helping organizations turn strategy into measurable impact.
- Working alongside three-quarters of the Fortune Global 500 across 40+ countries.
- >1,000,000 products optimized.

1 million

Products Optimized

15x

Improved ROI

320%

Quality Improvement

BOLT INSIGHT

Bolt Insight brings together AI-moderated quantitative, qualitative, and mixed-method research in one powerful ecosystem supported by the expertise of our research specialists.



Who are we?

- 95 employees who are *nuts about insights!*
- Offices in London, Paris, Italy, Istanbul, New York, Phila, Dallas, Sao Paulo, Singapore, Tokyo, Manila
- All market research professionals who understand methods, technology, & brand strategy
- SOC2 & ISO 27001 Certified
- GDPR compliant
- ESOMAR member
- Awarded Best-in-Class from MRMA, ESOMAR, Greenbook, Quirk's, and more.



Our Mission & Vision

What makes Bolt Distinct:

- The industry chose speed, **we choose substance.**
- While others build AI to replace the researcher, **we built Bolt to elevate and amplify them.**
- While others build AI to get insights at the speed of light, **we built Bolt to get insights at the speed of right.**

VISION

To become the world's first and leading consumer intelligence layer between brands and the billions of consumers they serve — where real human conversations become growth knowledge that compounds with every study, every market, and every decision.



THE PLATFORM

Methods Bolt Insight leverages for Kearney

Bolt

QUANTITATIVE

Survey research through interactive dashboards. Access to hard-to-reach audiences in 120 countries.

Answers the 'What'

BoltChatAI

QUALITATIVE

AI-moderated 'Qual at Scale.' Real-time conversations with consumers — depth, flexibility, speed.

Uncovers the 'Why'

Multi-Modal Qualitative

Conversational Quant

Digital UX

BoltDecode

OPEN-ENDED

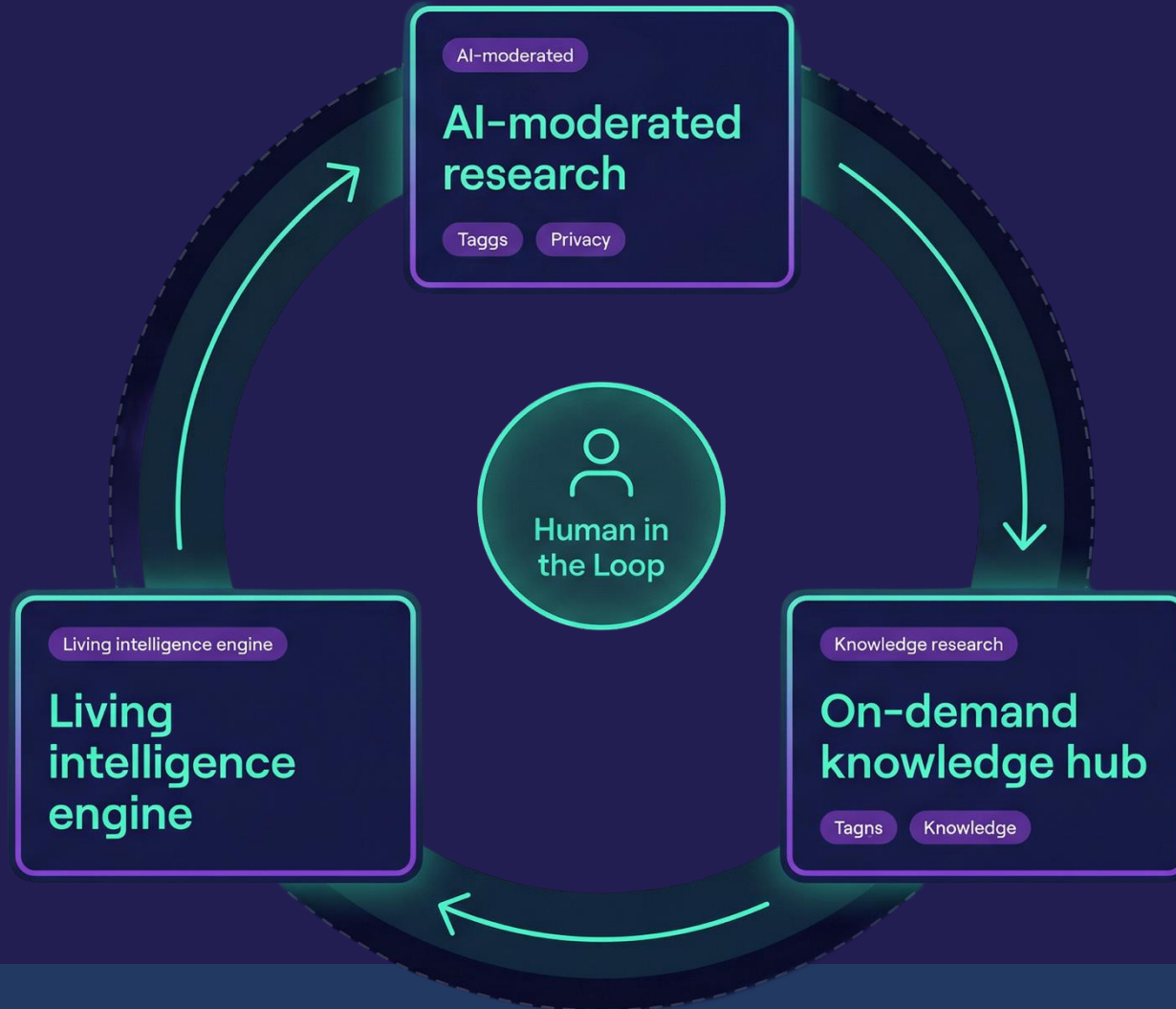
AI-coded open-ends and meta-analysis — raw text into strategic clarity, at scale, in seconds.

*Emotion, Sentiment,
& Topic Analysis*

THE PLATFORM



AI-Driven Qualitative Research @ Scale



THE CHALLENGE

Why Traditional Qual Doesn't Work Inside Typical Strategic Consulting Timelines



usually
6–10 wks

Traditional qual takes 6–10 weeks from design to delivery. **Strategy timelines can't wait.**



usually
\$50K+

IDIs and focus groups require \$50K–\$150K+ budgets per wave. **Clients want more for less.**



usually
base~15–30

Traditional methods yield only 15–30 interviews. **Insufficient base to validate across segments.**



usually
one shot

When concepts need refining, the entire cycle starts over if more qual input is required. **PERLab teams need agility and rapid prototyping.**

LEARN EARLY. ITERATE OFTEN. LAUNCH FASTER.

Case Studies

- Creative Testing
- Reaching & Understanding B2B Audiences
- In-Store Experience & Improvement

Creative Testing

Fast, iterative research that moves concepts from early exploration to consumer-validated ideas

1 Horizontal Testing

Explore a wide range of concepts to identify consumer appeal and preferred territories.



2 Vertical Testing

Assess different variants of one concept to refine and optimize before launch.



3 Quantitative Validation

Measure likeability, brand fit and purchase intention to validate concepts statistically



Qualitative testing — in-depth interviews for detailed insights



Quantitative testing — purchase intent and appeal at scale

REPORT

General

Create Report

ADVANCED REPORT

Search

Metrics

Chats

Question Analysis

Stimulus Analysis

Personas

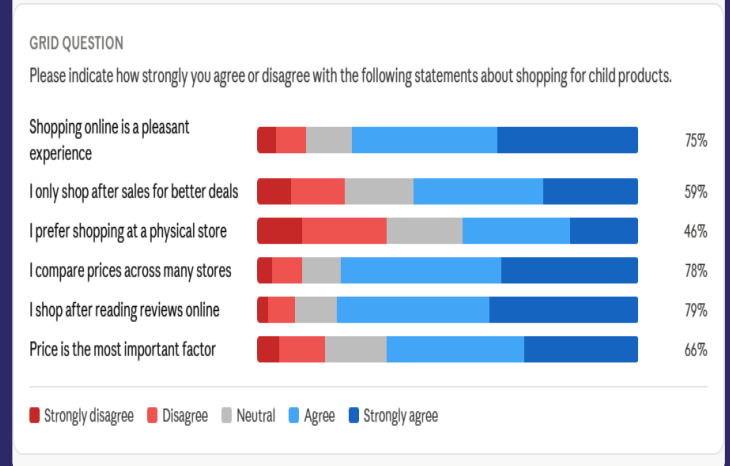
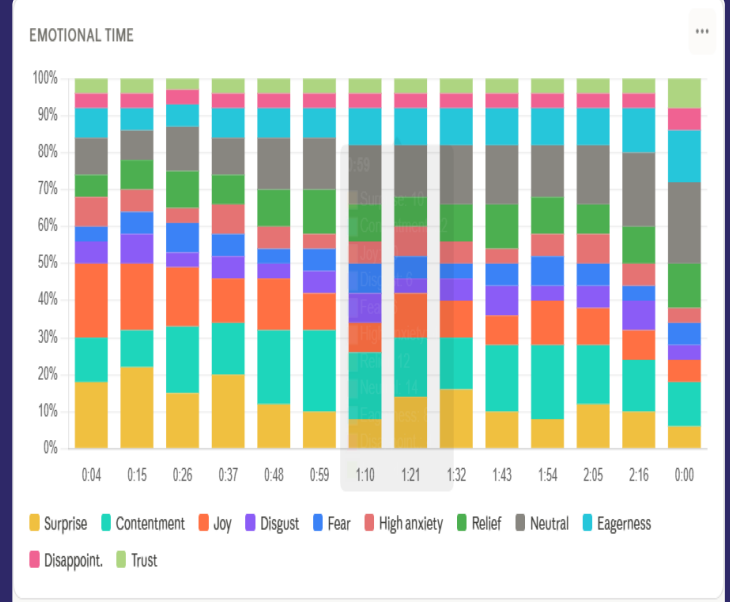
Stimuli: Any Format, Randomize Order, Rate/Rank/Compare

DOMINANT EMOTION Confident Energized - 42% of all responses	AVERAGE VALENCE +0.34 Neutral lean positive	AVERAGE AROUSAL +0.51 High energy	EMOTIONAL VOLATILITY Low Variable - stable range
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STIMULUS SCORES

STIMULUS	VALENCE	AROUSAL	SIGNAL
Stimulus 1	+0.38	+0.24	Moderate
Stimulus 2	+0.54	+0.08	High appeal
Stimulus 3	+0.30	+0.08	Moderate
Stimulus 4	+0.51	-0.04	High appeal
Stimulus 5	+0.31	+0.35	Moderate
Stimulus 6	+0.03	+0.24	Low appeal
Stimulus 7	+0.24	+0.14	Moderate
Stimulus 8	+0.31	+0.35	Moderate
Stimulus 9	+0.41	+0.20	High appeal



Flexible recruitment to reach niche B2B audiences

~1 WEEK turnaround for niche B2B audiences



Water Treatment & Pool Equipment Manufacturer

Three specialized studies reaching highly technical B2B audiences:

- Salt Chlorine Generators
- Heat Pumps
- Gas Heaters

Study Objectives:

- Understand perceived competitive strengths (product, support, etc.)
- Identify key carrying and purchase decision drivers to anchor competitive strategy on



Heavy Equipment Manufacturer

Study conducted using client-provided dealer list — direct links sent to dealers by the client.

KEY DIFFERENTIATOR

Demonstrates flexibility of the platform for B2B research with proprietary audience lists — not limited to panel recruitment.

Study Objectives:

- Identify drivers of purchase and loyalty in the compact and sub-compact tractor category
 - Evaluate significance of product features, brand equity, and service excellence



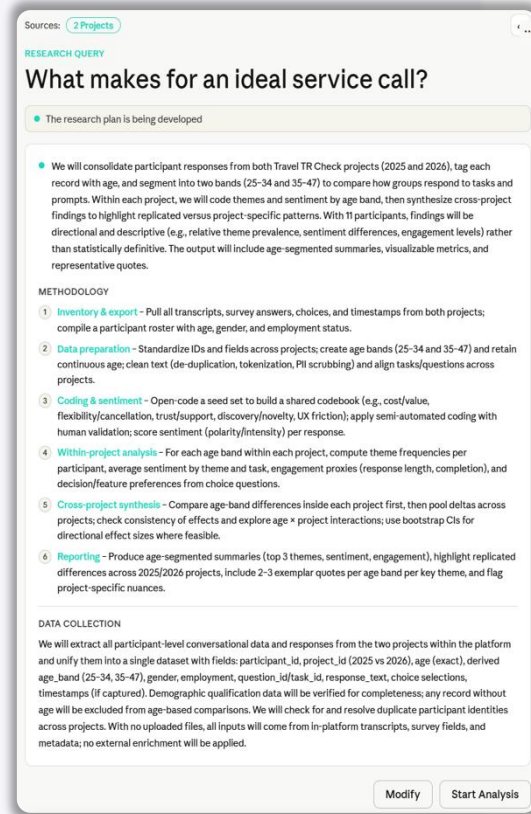
Cross-category reach includes hard-to-reach B2B audiences — pool owners, equipment dealers, automotive enthusiasts

Getting More Value from Fielded Research

Meta-Analysis

Connect dots across all past projects. Ask a question and get instant summaries, charts, and themes from accumulated research — no manual work.

- Track attitude shifts over time
- Compare behavior across segments
- Synthesize existing knowledge assets

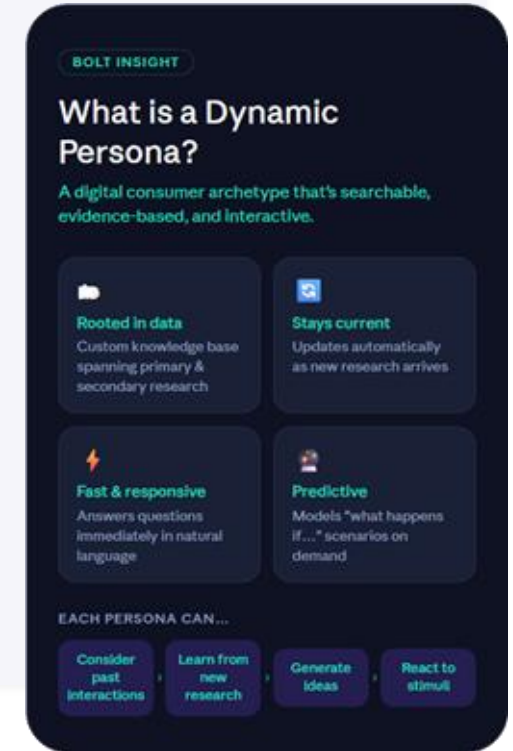


Dynamic Personas



Audience profiles built from real research that evolve as new data comes in. Kearney teams can query personas on demand.

- Ask why consumers choose products
- Test messaging and get instant feedback
- Compare across markets and lifestyles



In-Store Experience Diagnosis

Qualitative insights. Real shoppers. Actionable retail strategy

Why customers value a retail store experience

INSPIRATION

Sensory experience, quality of products, trying things in person

IMMEDIACY

Instant gratification of buying in-store

INTERACTION

Knowledgeable staff, fit help, style recommendations

What customers are saying about the stores

*"[retailer] is usually **very organized and color coordinated**, light denim to dark to very dark colors"*

*"[retailer] is a relatively **calm place** to shop compared to [competitors]."*

*"[retailer] could be a **little sleeker and brighter**...that dark industrial denim theme is not really appealing"*

*"I like [retailer], but I like that [competitor] is fun, edgy, a bit **more contemporary**"*

Considerations for store improvements

DENIM FOCUS vs complete styles

Retail environment should highlight head-to-toe styles with more focus on fashion trends.

INVENTORY vs dropship fulfillment

Ensure right mix of styles/sizes available in store and only through direct shipping.

MODERNIZATION vs doubling down on traditional brand equity

Balance of modern, minimal in-store displays with backdrop of laid-back, familiar nostalgia.

Source: Kearney / BoltChatAI online qualitative interviews.

REPORT

General

+ Create Report

ADVANCED REPORT

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Personas

Automatic Implicit v Explicit Assessment on all Audio & Video responses

Age 26, Male

Joy



"Even though they used it before me and I bought it after them, it makes me happy that I got an original product for a lower price than they did. Getting something cheaper always makes a person happier."

Discounts-Deals

Satisfaction-Regret



Vocal — signal conflict

The participant's vocal delivery is characterized by a steady, moderate pace and a neutral, informative tone. There is no discernible vocal inflection or energetic quality that would typically convey joy or enthusiasm, despite the verbal content explicitly referencing happiness.



Age 29, Female

Joy



"Yes, this is the product I eat every day in my breakfast routine without skipping. I really love homemade acuka. I love acuka because it has walnuts, tomato paste, and spices, so it's full of vitamins and it's healthy."

Spreads

Health-Nutrition

Taste-Enjoyment



Body



Posture, gestures/hand movements, body orientation, nervous habits, openness vs. closedness.



Vocal



Tone, pitch, pace, volume, hesitations, emphasis, and emotional undertone (paralinguistic only).



Facial



Expressions and micro-expressions, eye movement, brow position, and smile/frown patterns.



Object/Environment



Background and interacted items related to emotion, with guardrails to avoid PII.

What Makes Our AI Moderator Different?

Trained

Moderation

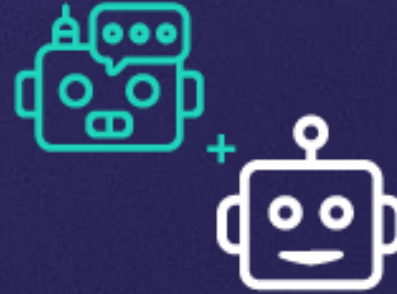


BoltChatAI started as a human-to-human platform.

We have conducted 1000s of high-quality interviews to train our AI Moderator on professional techniques.

Dual Agent

Moderation



An AI Referee monitors our AI Moderator to evaluate responses in real time and identify poor quality, deviations, and blind spots.

Creative

Probing



Our AI Moderator senses emotions and strong opinions and dynamically decides to probe deeper. It is trained to use projective questions to unlock underlying emotional drivers.

Human

+ AI



We are senior business leaders, seasoned qualitative researchers, and technical experts.

KEY TAKEAWAYS

Learn Early. Iterate Often. Launch Faster with Confidence.



SPEED

1–2 days in most CPG categories.
~1 week for B2B/niche audiences like pool equipment and tractor dealers.



SCALE

Start small or scale up — get large-scale input to gain confidence in the direction.



COST EFFICIENT + HIGH QUALITY

Fraction of traditional qual investment. Run multiple waves for the price of one study.



REACH

Cross-category and hard-to-reach B2B audiences. 120 countries, native-language.



LAUNCH & ITERATE

Test ideas as they develop. Understand what resonates. Adjust before major investment.



CUSTOMIZATION

Long-term partnership allows Kearney to optimize the platform for their use cases.

Thank You

Kearney × Bolt Insight
PERLab

www.kearney.com | www.boltinsight.com

