

Getting the facts,  
faster.  
How you can unlock  
reporting insights for  
everyone who needs

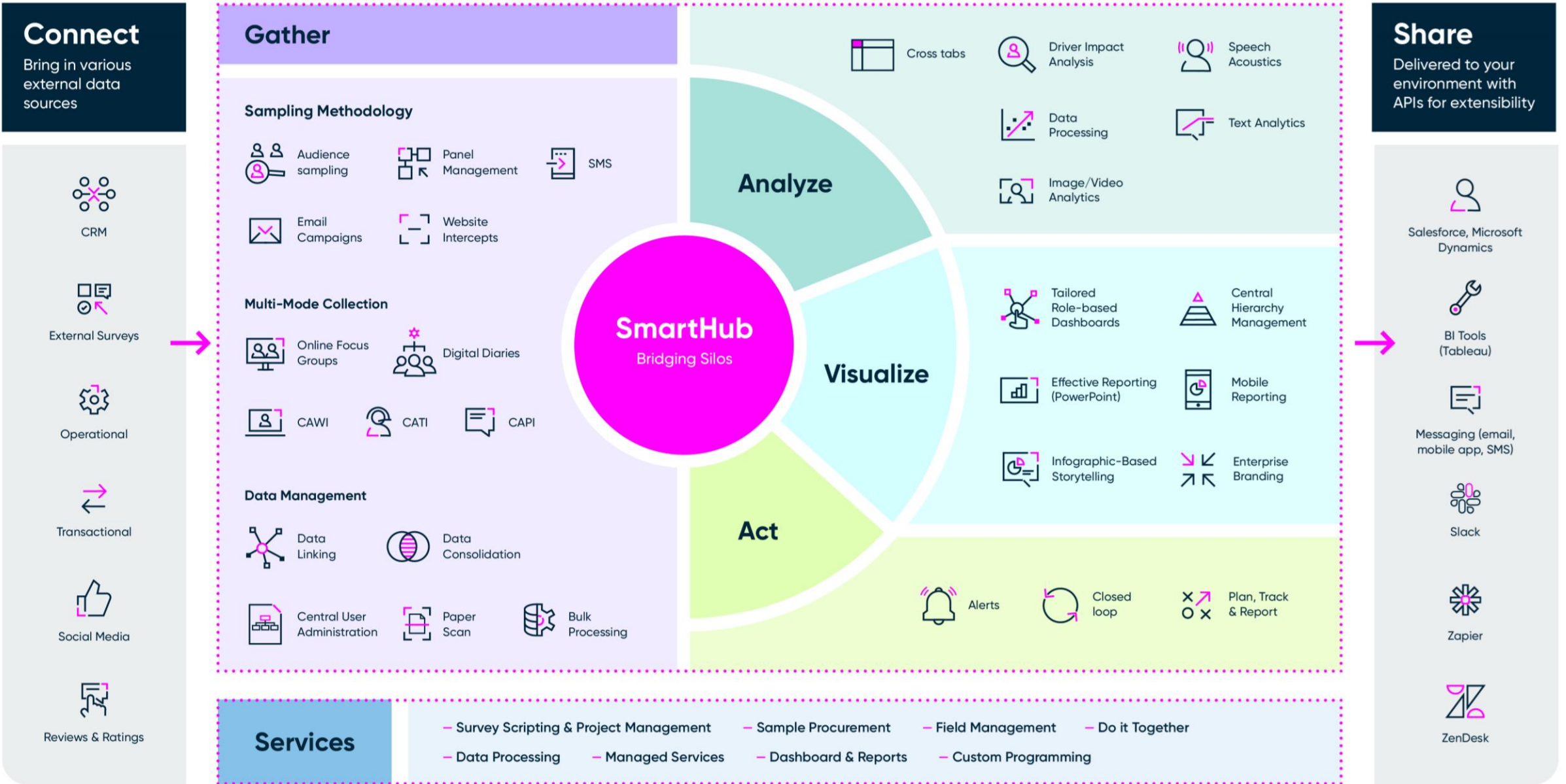
February 2023

Donnie Brisee, VP AM, Forsta; Glenn Summer, VP Global

Tracking Material

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# Forsta HX Platforms



## Connect

Bring in various external data sources



CRM



External Surveys



Operational



Transactional



Social Media



Reviews & Ratings

## Gather

### Sampling Methodology



Audience sampling



Panel Management



SMS



Email Campaigns



Website Intercepts

### Multi-Mode Collection



Online Focus Groups



Digital Diaries



CAWI



CATI



CAPI

### Data Management



Data Linking



Data Consolidation



Central User Administration



Paper Scan



Bulk Processing

## Services

- Survey Scripting & Project Management
- Sample Procurement
- Field Management
- Do it Together
- Data Processing
- Managed Services
- Dashboard & Reports
- Custom Programming

## Share

Delivered to your environment with APIs for extensibility



Salesforce, Microsoft Dynamics



BI Tools (Tableau)



Messaging (email, mobile app, SMS)



Slack



Zapier



ZenDesk



# Forsta Visualizations

**Deliver data as a complete and compelling story**

## Interactive Dashboards

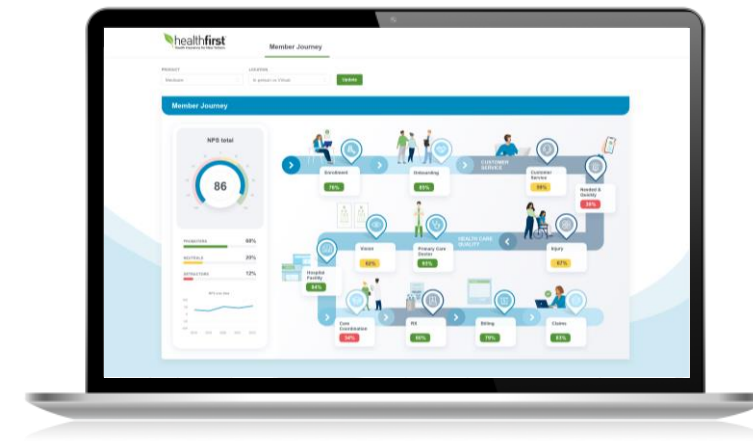
Insights brought to life as broad patterns and detailed stories.

## Automated PPT Production

Get them the facts, fast.

## Cross Table Tools

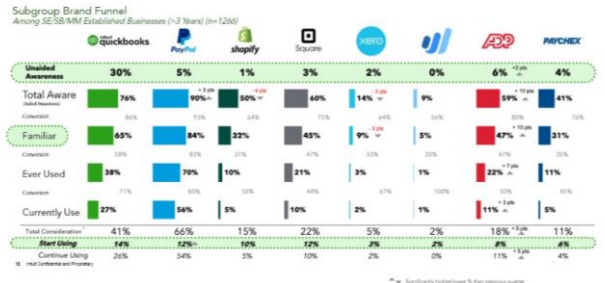
Dive deep with intuitive tools to create data cuts on the fly.



# Who has seen one of these recently?

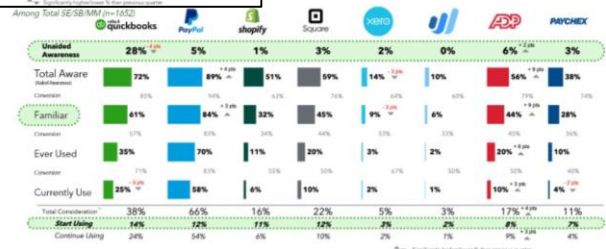
Metrics are consistently higher among Established Businesses, with QuickBooks and PayPal the clear leaders. ADP has strengthened its position with the help of this group and MM.

ADP growth is in part driven by changes in respondent population of businesses who made more revenue in 2020 than 2019, with the increase especially among MM. As these businesses continue to grow they may be looking to invest in more tools for their business. Additionally, in July ADP announced it expanded its workforce management client base to +100.



awareness this quarter, but maintains its strong lead only PayPal, despite ADP growth

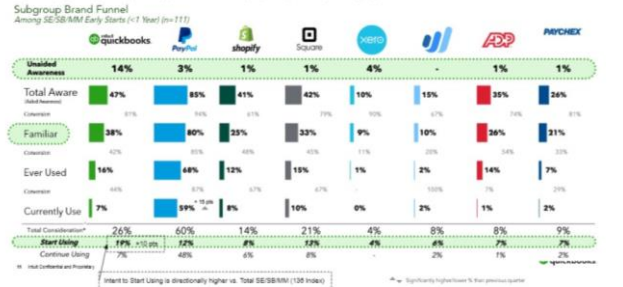
Net, there has been an increase in the percentage of SBs who have not based anything from us recently, particularly among SBs (91% 27% vs. 92% 19%) of businesses who made more revenue in 2020 than 2019, with the increase especially among MM. As more tools for their business. Additionally, in July ADP announced it expanded its workforce



ToF is consistently lower with Early Starts across Square at levels parity to Total - illustrating how

QuickBooks funnel is lower with Early Starts, except for intent to Start Using, which grew substantially this Quarter. This might be due to increased awareness of our marketing efforts as the percentage who have "heard nothing" about us declined from 36% to 30% in Q2 '19.

Shopify is used by more Early Starts (8% than Total SE-SB/MM (6%)) with PayPal and Square at parity.



## Appendix



## Appendix

We can now minimize that work when we have a tool built for MR. Browser-based fast access, for stakeholders and suppliers, and intuitive to your needs.

Material+

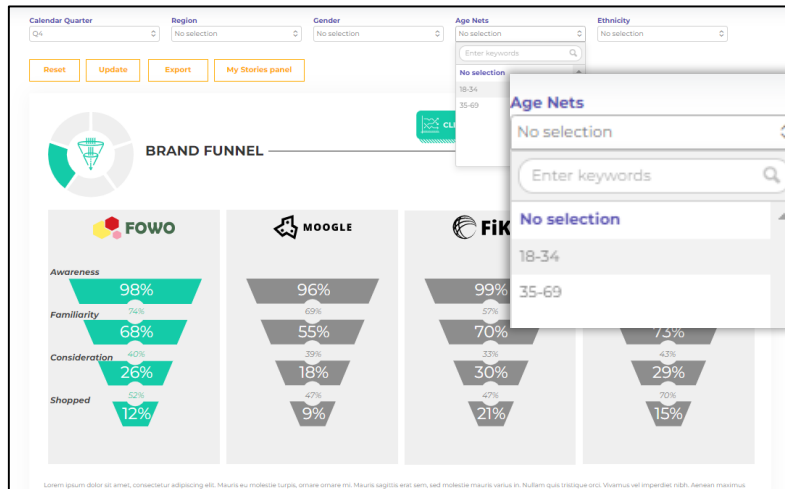
Overview Brand Health Brand Funnel Brand Love Brand Drivers Deep Dives Custom Table Builder  
Document Library My Stories

Calendar Quarter: Q4  
 [Reset] [Update] [Export] [My Stories panel]

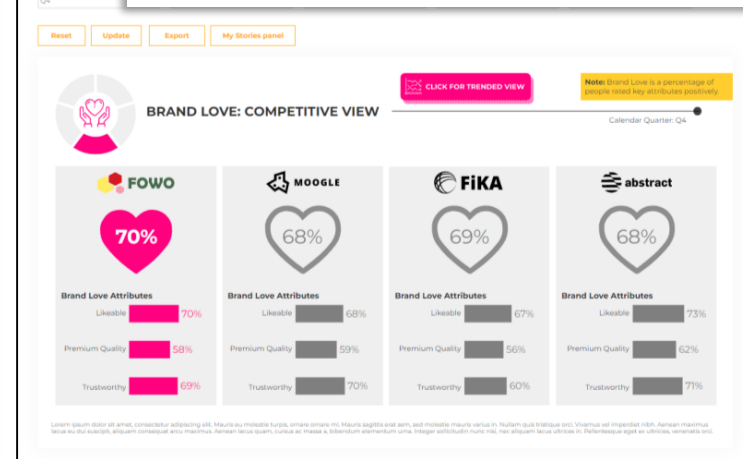
Material+

Overview Brand Health Brand Funnel Brand Drivers Deep Dives Custom Table Builder  
Document Library My Stories

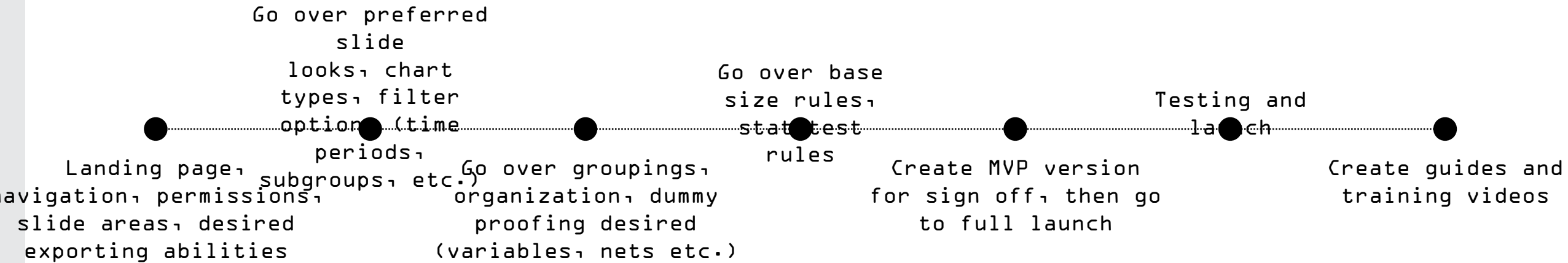
Calendar Quarter: Q4  
 [Reset] [Update] [Export] [My Stories panel]



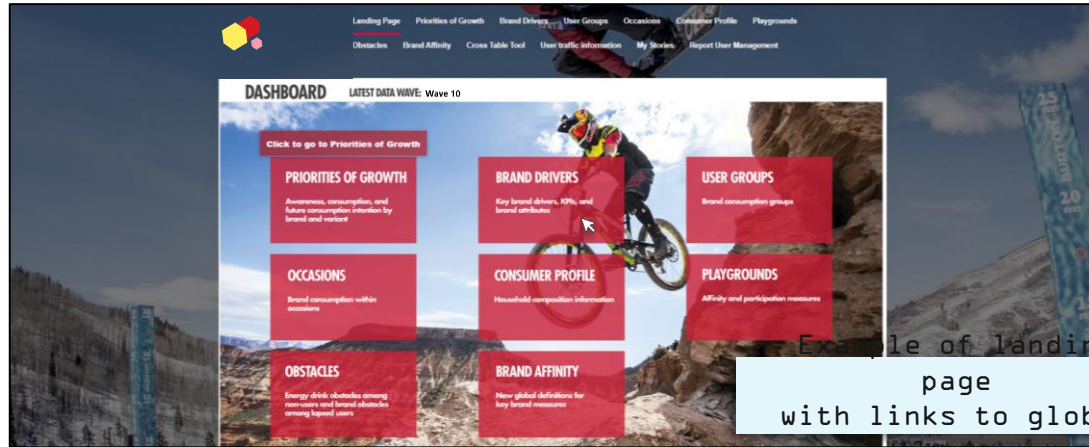
Calendar Quarter: Q4  
 Region: No selection  
 Gender: No selection  
 Age Nets: No selection  
 Ethnicity: No selection



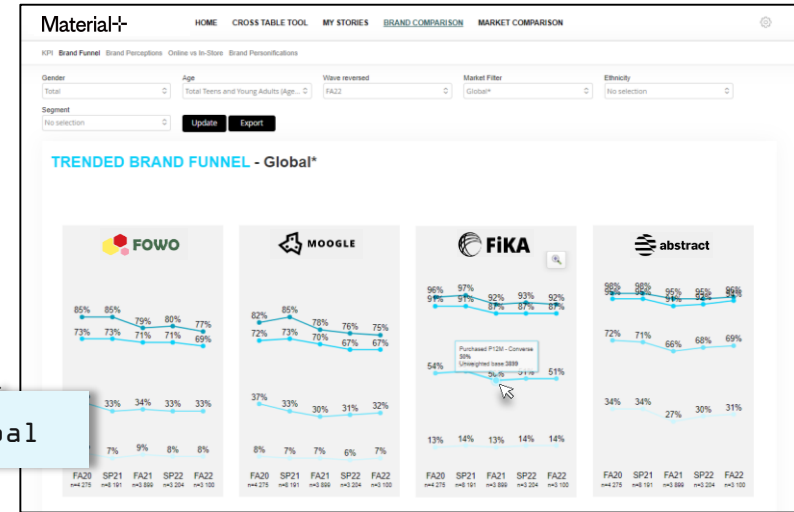
# A successful cross-tab and dashboard tool requires the right tool and the right planning.



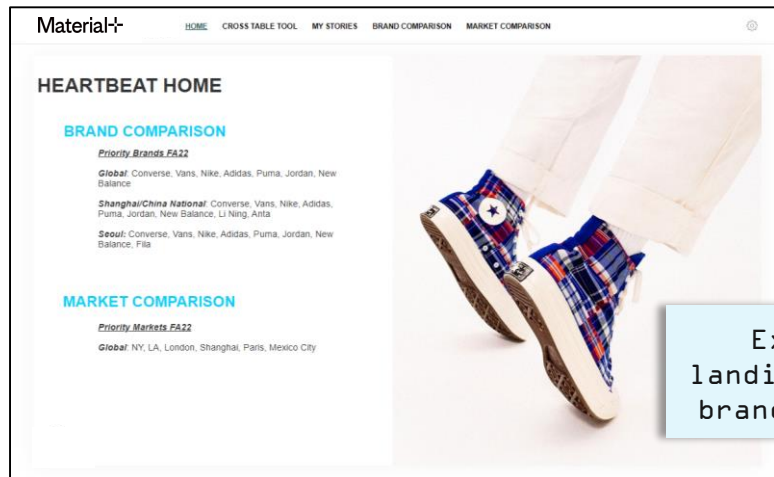
# Intuitive capabilities and smooth workflows from the get-go



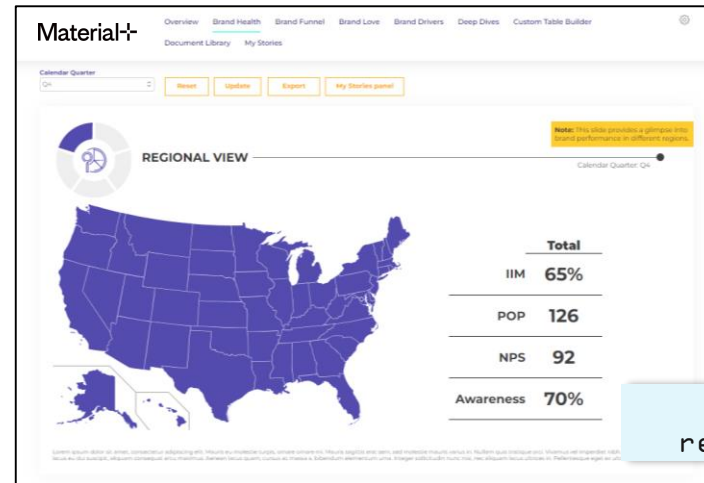
Example of landing page with links to global looks



Example of trended global view

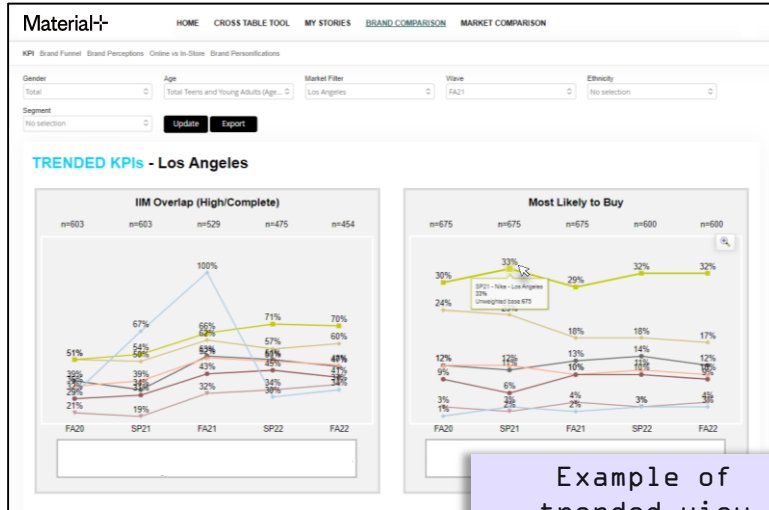


Example of landing page with brand comparison

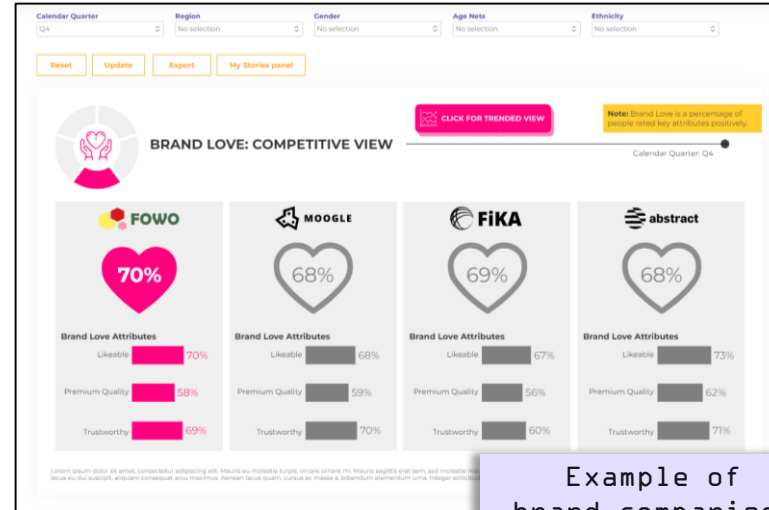


Example of regional view

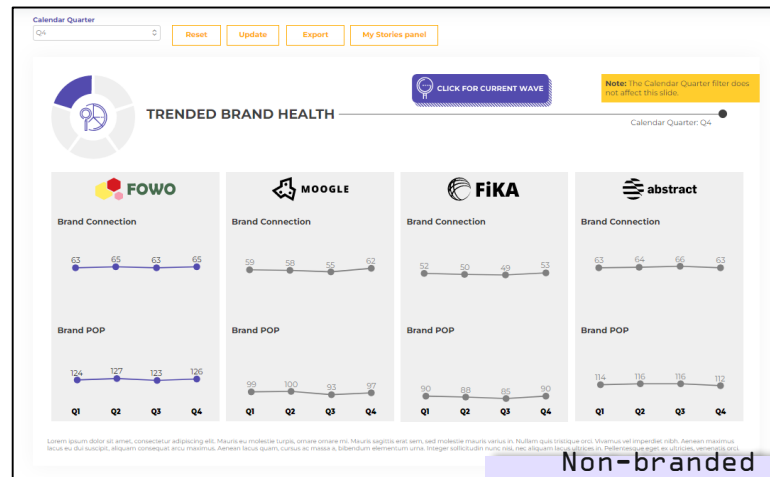
# Top notch visuals



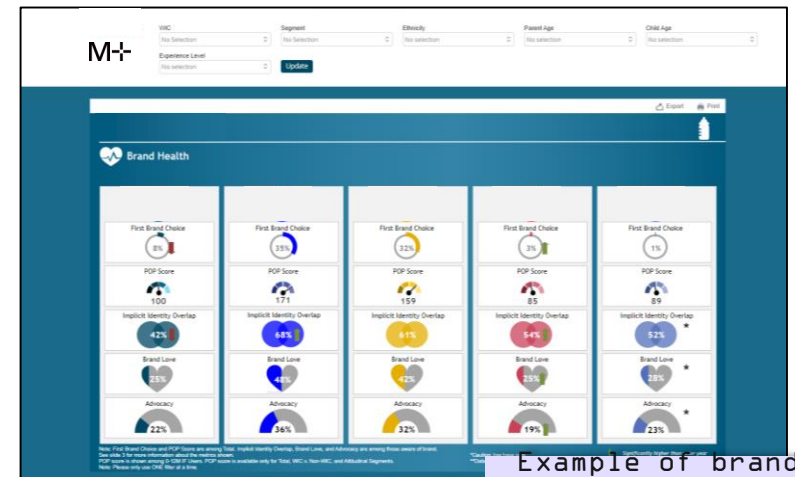
Example of trended view



Example of brand comparison



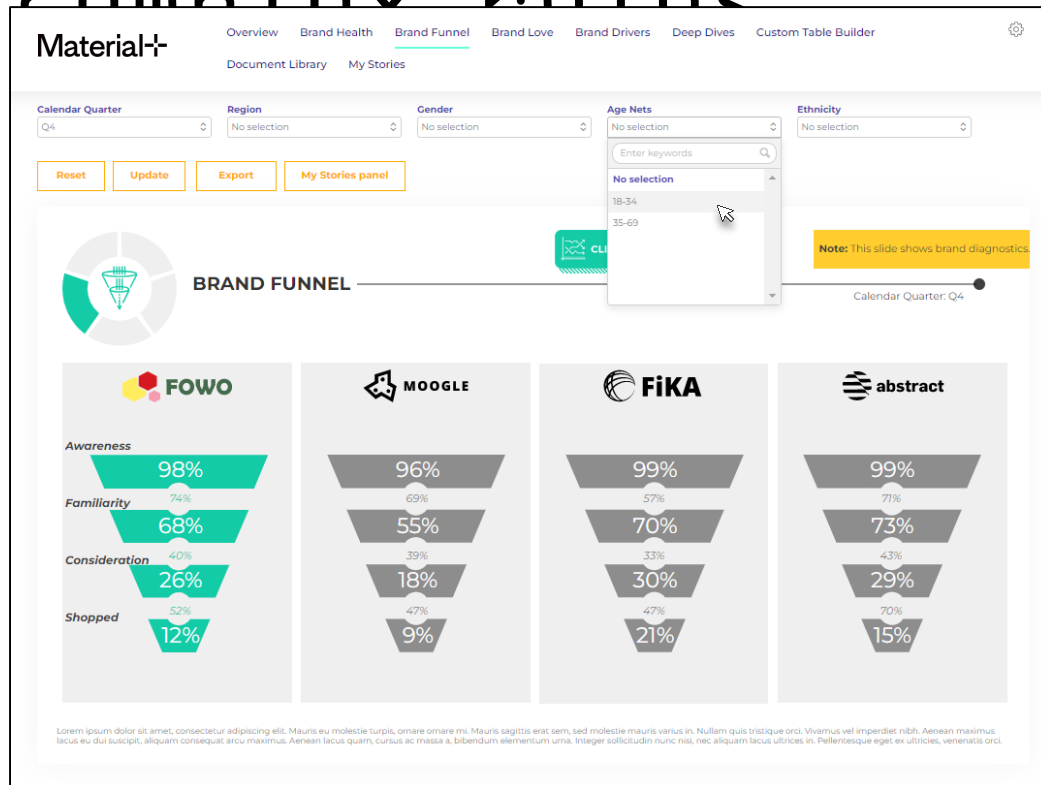
Non-branded example of trended view



Example of brand funnel + filtering + %'s

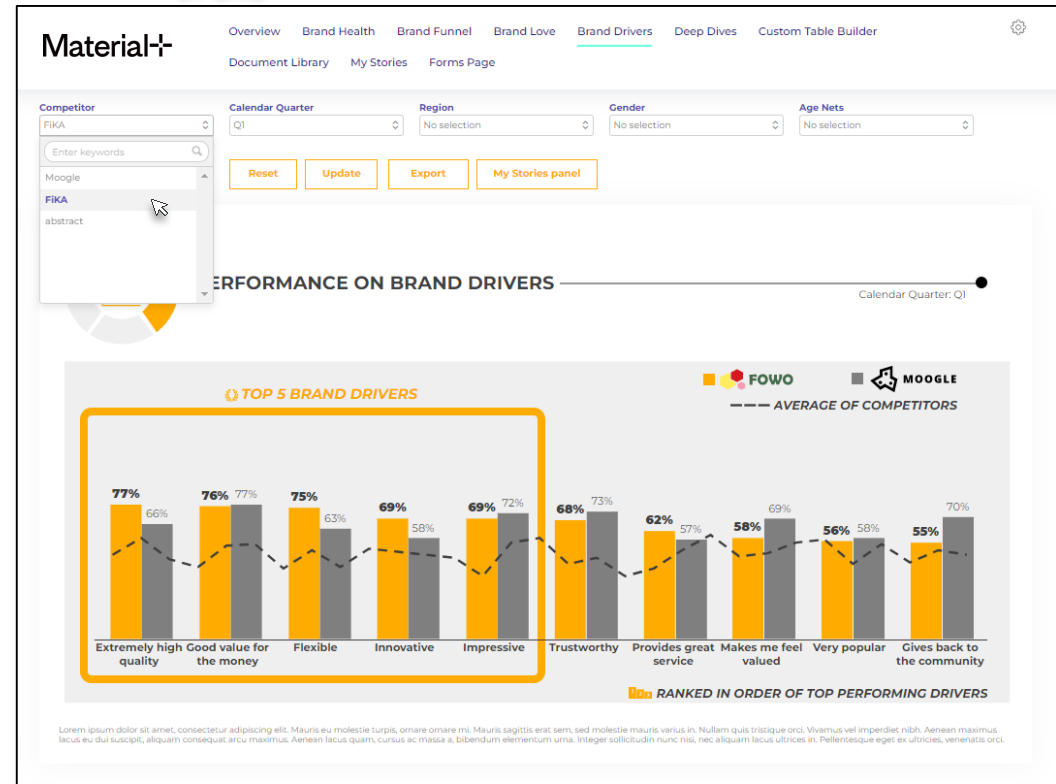


# Flexible analysis that can handle complex rules

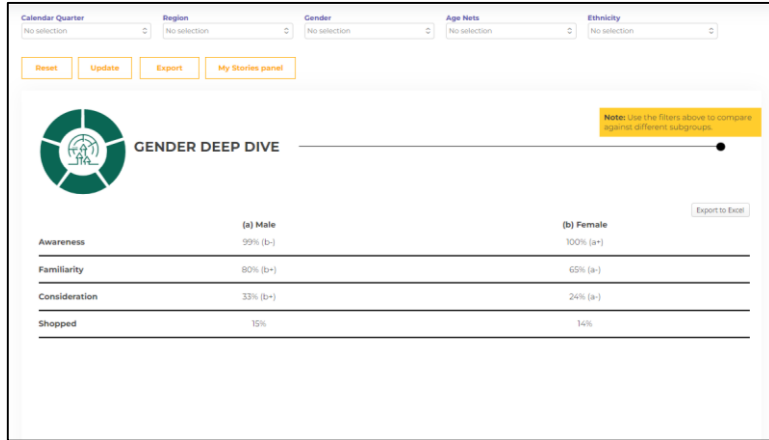


Example of brand funnel + filtering + %'s


Example of brand drivers + adding/removing brand




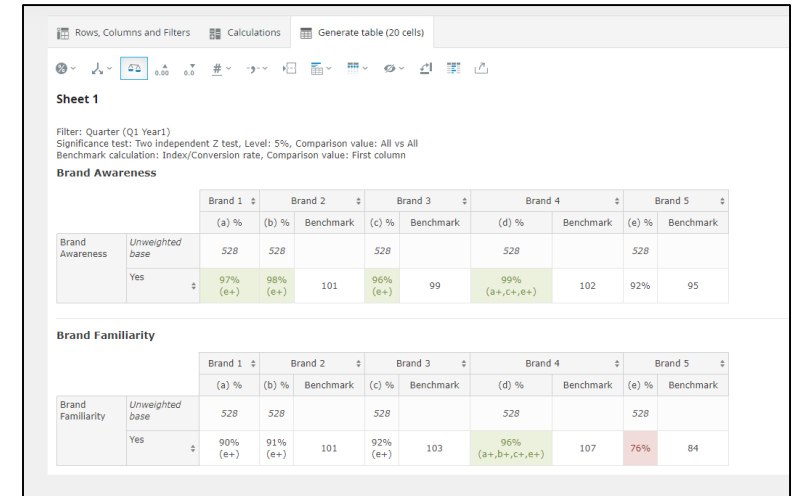
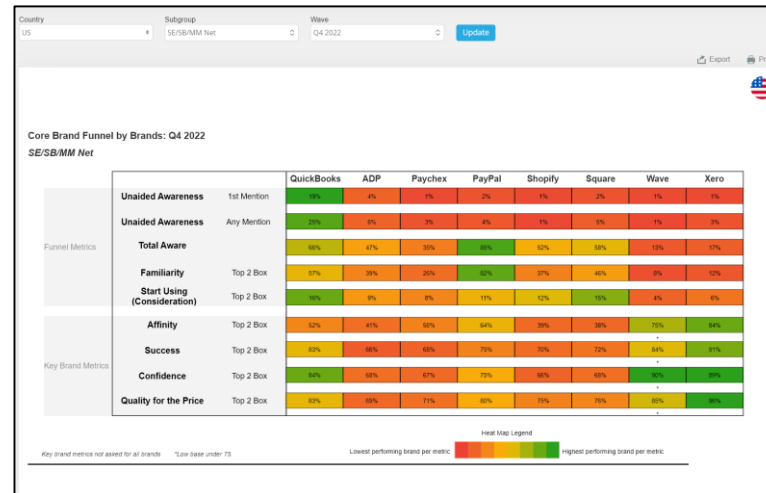
# Who does this help? Everyone.



  
**Client Brand Manager**  
 Drawing brand comparisons

  
**Supplier**  
 Doing deep dives to pull out the story

**Day-to-day Client**  
 Doing deep dive into subgroups

# Beauty and Brains. A great visualization tool also has even more powerful cross-tab data functions underneath.

**Nesting Variables**

The screenshot shows the 'SPLIT SETTINGS' dialog box with the 'Nest variable splits' option checked. The 'Columns' section shows 'Region' and 'Calendar Quarter' selected. The 'Rows' section shows 'Family Level' with 'Fovv', 'Moogle', and 'FKA' selected.

**Weighting**

The screenshot shows the 'STANDARD CALCULATIONS' panel with the 'Use weight' option checked. The 'Categorical calculations' section includes 'Number of decimals' (0), 'Unit' (%), and 'Suffix' (v). The 'Percentage share' option is also checked.

**Custom Nets**

The screenshot shows the 'AGE BREAKS' panel with a list of age ranges (18-24, 25-34, etc.) and the 'CREATE GROUPED ANSWER' panel with a 'Label' field containing '18-34' and a list of selected age ranges.

**Sorting/Ranking/Benchmarks**

The screenshot shows the 'BENCHMARK' panel with 'Enable benchmark calculation' checked. The 'Calculation' dropdown is set to 'Index/Conversion rate'. The 'Comparison columns' dropdown is set to 'First column'.

**Multiple tables on a sheet**

The screenshot shows a data table with columns for 'Region', 'State', 'Connected', 'Share', 'Households', 'New users', 'New users %', 'Performance', 'Spillover', and 'Verdict'. The table is split into two sections for 'Family Level - Fovv' and 'Family Level - Moogle'.

**Global Filters**

The screenshot shows the 'Workbook Filters' panel with a list of filters including 'Family Level', 'Banners', 'Age Nets', 'Gender', 'Region', 'Ethnicity', 'Generation', 'State', 'Income', 'Calendar Quarter', and 'Miscellaneous'. A 'REGION' filter is shown with 'Northeast' selected.

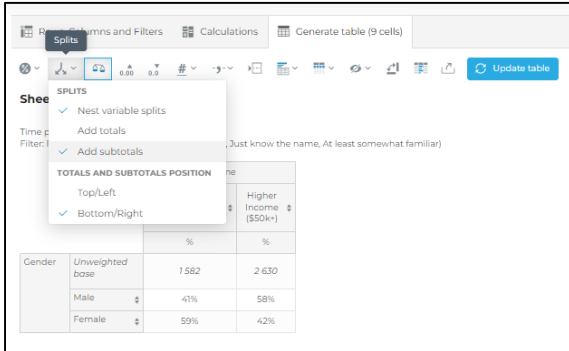
**Significance Testing**

The screenshot shows the 'SIGNIFICANCE TESTING' panel with 'Enable significance tests' checked. The 'Analysis type' is set to 'Two independent T test'. The 'Significance level' is set to '5%' and the 'Base size' is set to 'Unweighted'.

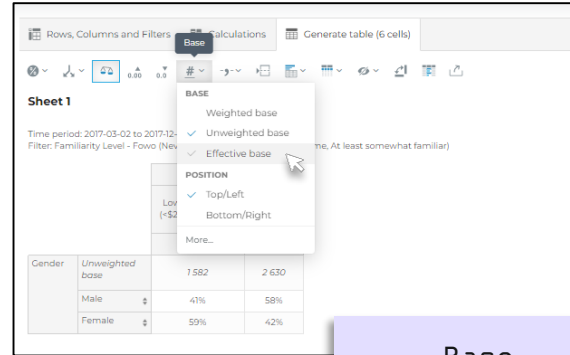
**Multiple tables on a sheet**

The screenshot shows a data table with columns for 'Region', 'State', 'Connected', 'Share', 'Households', 'New users', 'New users %', 'Performance', 'Spillover', and 'Verdict'. The table is split into two sections for 'Family Level - Fovv' and 'Family Level - Moogle'.

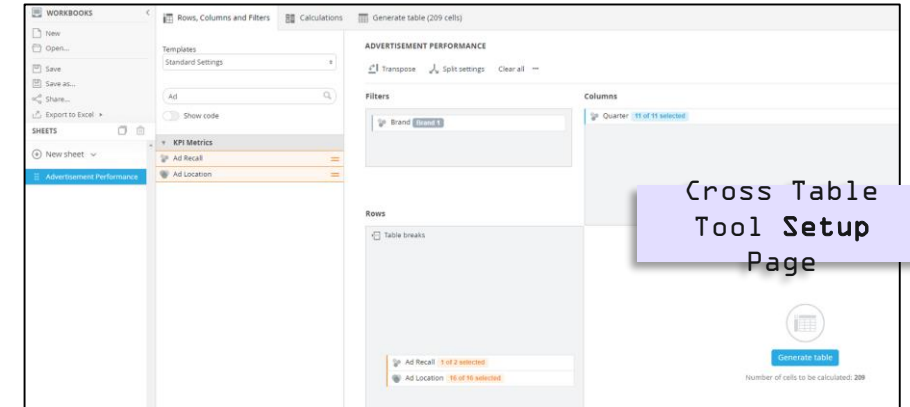
# Beauty and Brains. A great visualization tool also has even more powerful cross-tab data functions underneath. (cont'd)



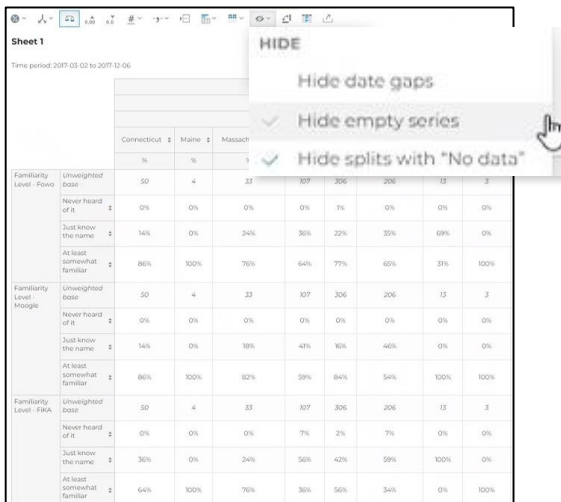
Splits



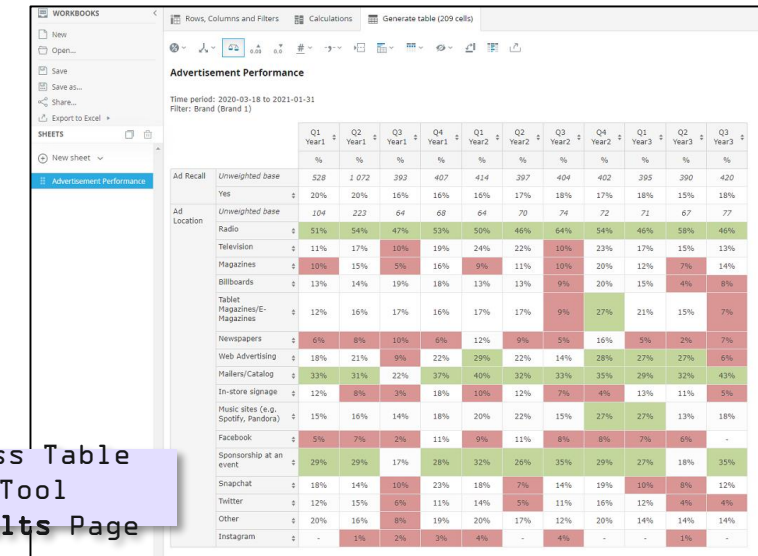
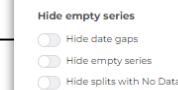
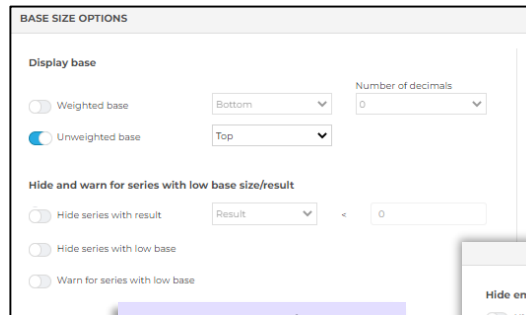
Base



Cross Table Tool Setup Page



Base Size Options



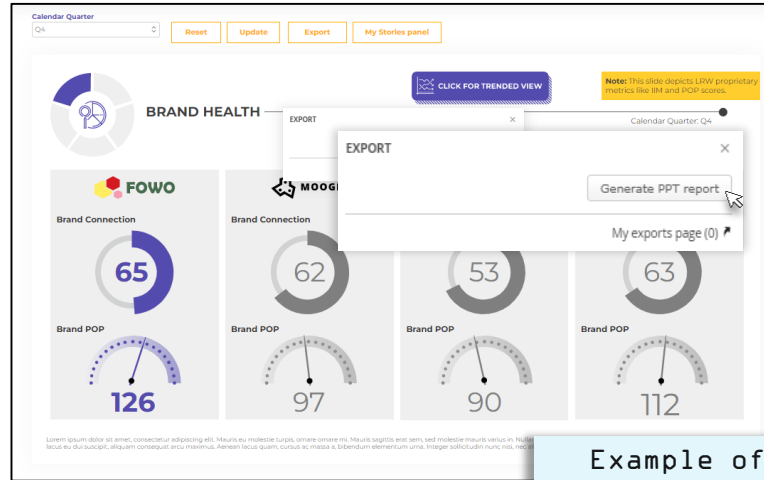
Cross Table Tool Results Page

Great tools get you the ability to do standard looks and do deep dive storytelling that answers tough business questions.

Export to

- Export all sheets as separate sheets
- Export all tables as separate sheets
- Export all sheets into one single sheet
- Export selected sheet(s) as separate sheets
- Export selected sheet(s) tables as separate sheets
- Export selected sheet(s) into one single sheet

Example of export Cross Table Tool



Example of export to PPT

Rows, Columns and Filters | Calculations | Generate table (3 cells) | Export to Excel

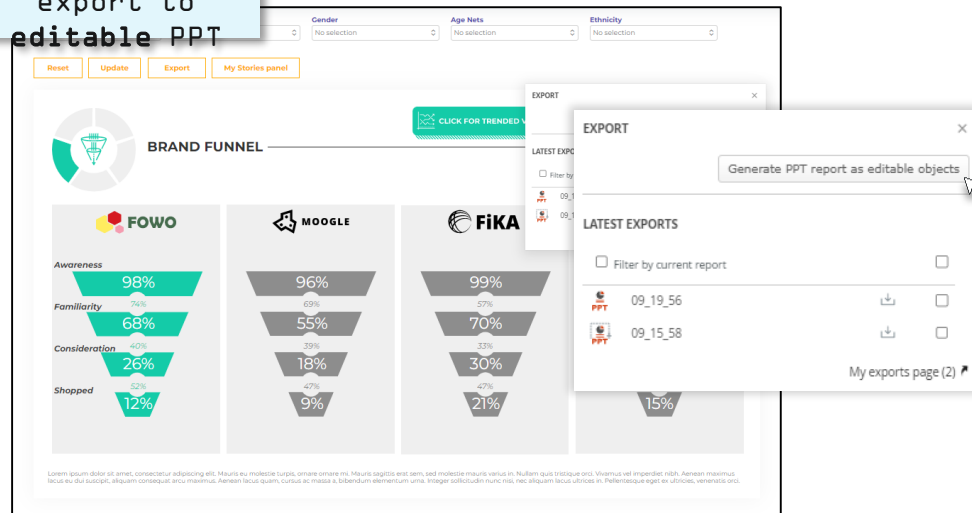
Sheet 1

Time period: 2017-03-02 to 2017-12-06  
Filter: Familiarity Level - FIKA (Never heard of it, Just know the name, At least somewhat familiar)

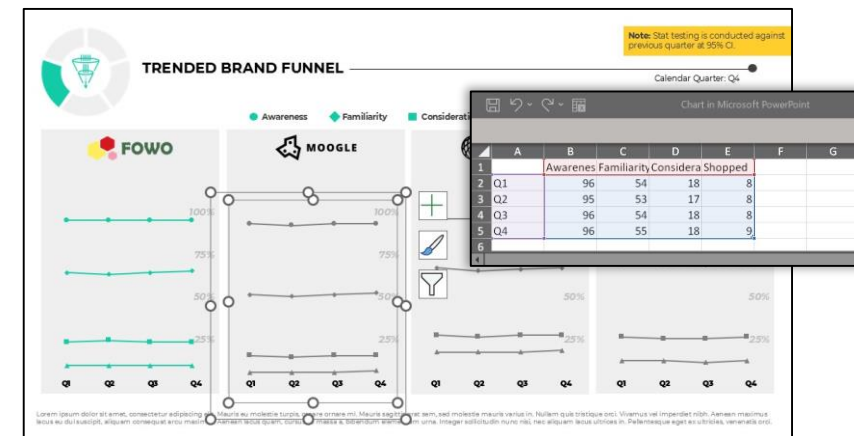
Gender	Unweighted base	%
Male	4,212	51%
Female		49%

Example of result + export to Excel

Example of export to editable PPT

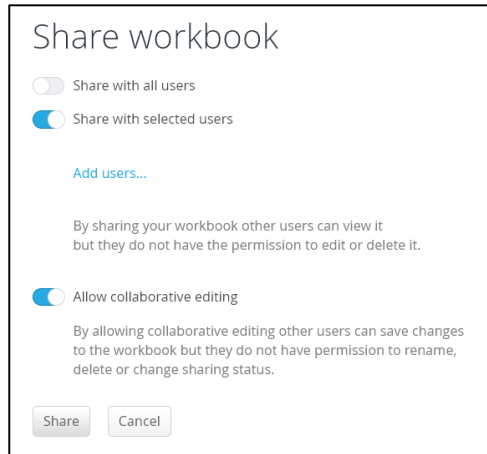


Edit data feature

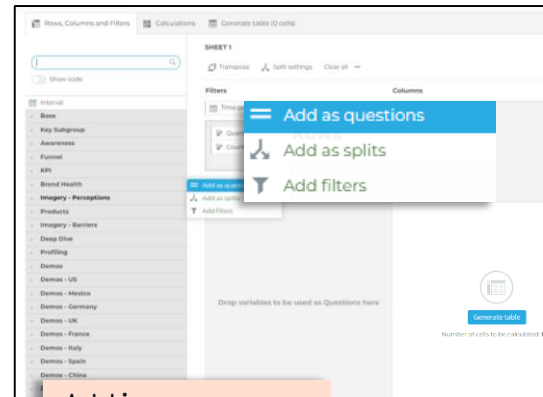


# A great tool also makes it easy to create your own workbooks and collaborate.

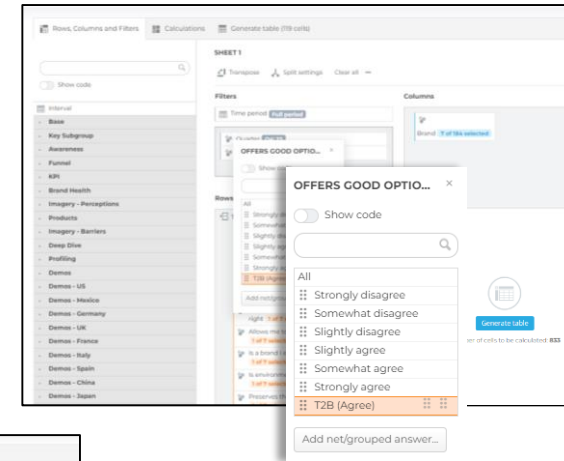
## Share Workbook Capabilities



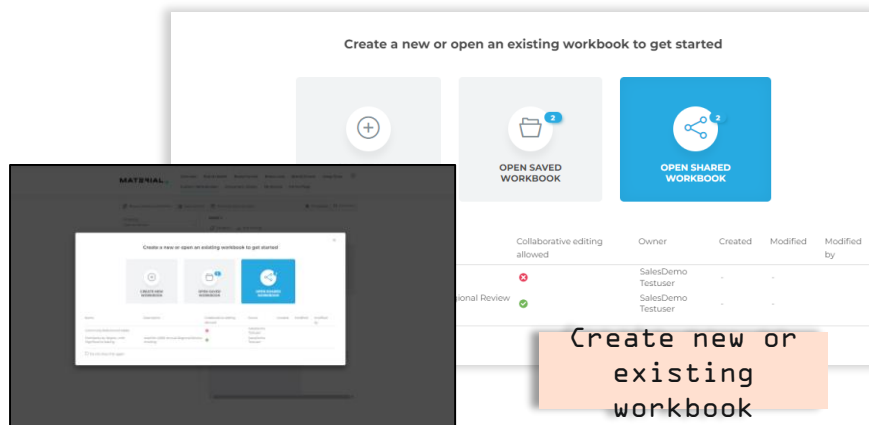
## Variable functionality in the Cross Table Tool



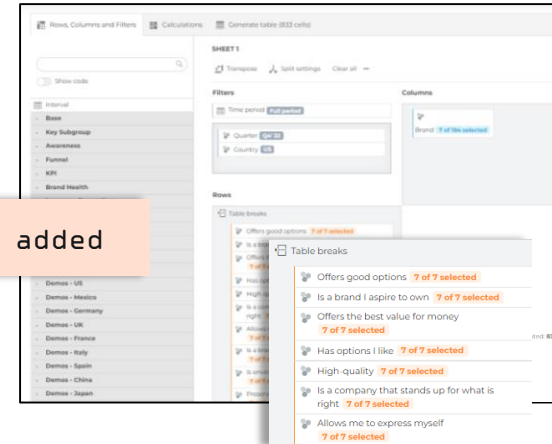
Adding a group of variables



Group with T2B selected



Create new or existing workbook



Group added

# Some Use Cases

"We only need it for the two of us."

## Client 1

- Flash forward: 30+ users around the world

"Can you still create paper versions?"

## Client 2

- Flash forward: Reports cut by more than 50%, including some slides that are merely exported

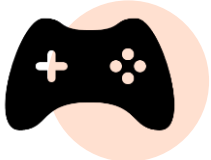
"Can you make it so we can get a quarterly look, with the quarters starting at any month we choose."

## Client 3

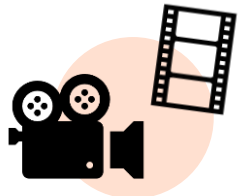
- Material: Let's discuss options (And yes, we did.)

# Material 20+ clients on Forsta Visualization

In Categories including:



Gaming



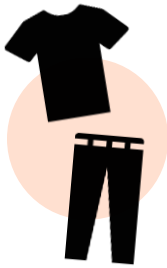
Movies/TV



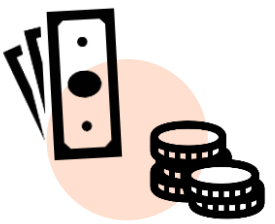
Retail



Shoes



Apparel



Financial



Medical



Social Media



Transportation



# Key Takeaways

The right visualization tool provides:

1

Fast data access for team, stakeholders, and suppliers



2

Intuitive capabilities and smooth workflows



3

Flexible analysis with top-notch visuals



Material+

 Forsta

Thank You