

June 30, 2026

# THE HUMAN EDGE IN INSIGHTS

Moderated Research at Scale in Age of AI





# Housekeeping

- Have a question for our panel? Use the Q&A tab at the bottom of your screen
- We'll share the recording, deck, ways to get in touch with our panel, and other mentioned resources following the session



TODAY'S GUESTS



# Speakers



**Jennifer Airey**

Founding Partner  
Heart+Mind Strategies



**Andrew Cober**

Sr. Qualitative Consultant  
Heart+Mind Strategies



**Lauren Hillery**

VP of Strategy  
LaneTerralever



**Douglas Griffen**

Co-Founder & CEO  
Converge



# Converge

- ✓ Real-time moderated sessions, 20 to 100+, ~60 min, all at once and anonymous
- ✓ Focus-group depth at survey scale, no loudest-voice bias
- ✓ Speed to Insight: days, not weeks
- ✓ AI throughout: guide build, live summaries, post-session analysis
- ✓ Human leads, AI accelerates





## Converge x User Interviews

- ★ First moderated group platform to integrate User Interviews
- ★ Filling the room is the hard part. Solved.
- ★ Recruit from the 6M panel, screen, schedule, and join, all inside Converge
- ★ 3 to 4 weeks down to days
- ★ LaneTerraever, 32 car buyers in 48 hrs, 91% showed
- ★ Heart and Mind, 31 Resort Destination Families, 96% showed



# LT.agency



Independent marketing agency founded in 1962 in Phoenix, Arizona.



Category agnostic, but specialize in education, healthcare, tourism, gaming & attractions



70-person team, full-service, including account services, strategy, branding, media, PR, creative, content, technology, data and analytics.



Values-driven and research/strategy forward organization

Our latest report developed with the Converge platform.



Scan to see more of our reports!

# Financial Services Examples: Certification + Wealth Management

## STUDY 1 Beta Test

- Test harder-to-recruit audiences
- Test TV spots



## STUDY 2/3\* Impressive Results

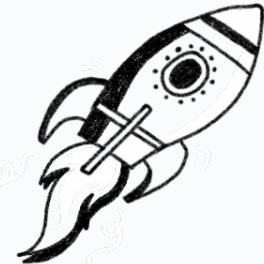
- Recruit HNW, UHNW, and business owners
- Value proposition development, and quick turn re-testing
- Rotating concepts

*\*QUICK SUCCESSION (PROJECT X2)*

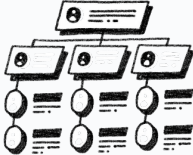





## STUDY 4 Experiment

- Parallel study
- Deep probing



# Human-guided AI + Platform Integration = Speed to Insights

Recruitment	Pre-field	In Session	Reporting
<ul style="list-style-type: none"><li>• Quick access to panelists</li><li>• Instant feasibility assessment</li><li>• Detailed respondent profile data</li><li>• Reduced time from weeks to 2 days</li></ul> 	<ul style="list-style-type: none"><li>• AI assisted guide development</li><li>• AI guide programming</li><li>• Opens tool programming to entire staff</li><li>• Reduced design and programming from days to hours</li></ul> 	<ul style="list-style-type: none"><li>• Human-guided AI categorization</li><li>• AI section summaries</li><li>• AI Assistant programming</li><li>• Human/AI collaboration in the moment</li></ul> 	<ul style="list-style-type: none"><li>• AI Overview summaries</li><li>• H+M branded LLM reporting</li><li>• Significant time savings in deck creation</li><li>• Allows for greater time allocations toward insights</li></ul> 

THANK  
YOU

The text 'THANK YOU' is rendered in a bold, black, outlined, bubbly font. The words are stacked vertically, with 'THANK' on top and 'YOU' below it. The text is tilted slightly to the right. There are four small, four-pointed stars scattered around the text: two above 'THANK' and two below 'YOU'. The entire graphic is centered on a white background.