

SMARI

By Rebecca Patrick

Taking It to the Next Level

You can tell when people like where they work and who they work with. The commitment, enthusiasm and rapport is everywhere you turn.

The employees at SMARI – 15 strong full time – fall into that category.

Whether it's all-hands-on-deck for a last-minute research project that was completed in one day (exceeding client expectations) to reminiscing about the trials of the highest level of The Escape Room (a team-voted Christmas activity last year). By the way, they didn't conquer that ultimate prize and are still teasing president Katie Simmermon because she was so sure they would.

Yet things once weren't as copacetic for the marketing research firm on the far north side of Indianapolis.

SMARI has always been profitable and succeeded based on strong performance and client referrals; however, the in-house atmosphere lacked an air of collaboration.

Operations director Michael York, who

was part of the transformation process, stresses: "We've come a long way in the last three years – we've done a 180 from where we were. It was departmentalized, closed doors. We are a different place and have a different energy."

Big changes pay off

SMARI was founded in 1983 by Jim Ittenbach, who remains CEO. In 2014, a company split occurred that shifted the research geared toward travel and tourism to his partner in what became SMARInsights (located in downtown Indianapolis). The more custom research arm remained under Ittenbach's guidance and kept the SMARI name, which is short for Strategic Marketing and Research Inc., and is heavy on servicing health care, manufacturing, retail, nonprofits and agencies.

This reorganization also coincided with Ittenbach's five-year succession plan for Simmermon, who took over as president at the start of 2017. He credits her for the company's culture rebirth.

"About three or four years ago, Katie began to craft her vision of how she wanted to create the next version of SMARI. Our lease was up for renewal; she wanted to get into more open and collaborative spaces to get that spirit going. ... I just stepped back and let her lead the charge."



Simmermon returns the compliment. "Often there are two battles that are fought (during leadership transition) – letting go and the taking over. Jim is supportive. We are on the same page with leadership, so that's great.

"I say he's always had me on guard rails so he will let me go my own path and trust where we are going, but they are bumper rails so I don't get too off course or mess things up too bad," she jokes.

Adds R.J. Gerard, an account executive who has been with SMARI for six years: "You can't talk about SMARI without talking about the leadership here. ... Leadership begets hiring the right people. Leadership and hiring the right people make it a joy to come to work. I can't underscore enough what a phenomenal job Katie has done."

What took place over the last three years – driven in large part by Simmermon, as well as York whom she hired – delivered a breath of fresh air into SMARI.

Out went the formal offices for most staff (sans leadership, who still only spend minimal time in them). In came an open environment that fosters teamwork and features whiteboards galore, not to mention a puzzle station and 12-foot hanging garden. A new logo and web site kicked off the makeover.

Gerard couldn't be happier with what he sees today.

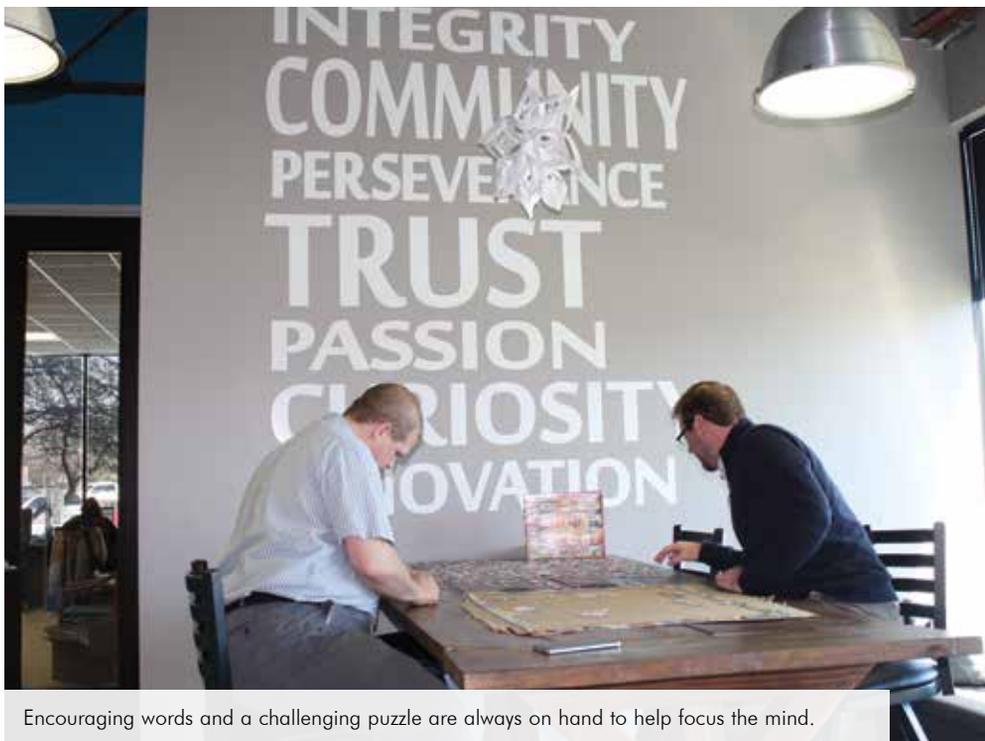
"We've done a better job as an organization of collaborating and working together. That ability to embrace multiple ideas are better than one and utilizing the whiteboards as a way to express ideas, share insights, map out



President Katie Simmermon (left) calls seeing feedback from employee reviews in January "the best day of my life – everyone was so positive and said 'I really love working here.' To quote Wes (Fry, consumer insights analysis, who is receiving a high-five from CEO and founder Jim Ittenbach), 'It's like we are the cool kids and I get to be part of the group!'"



Operations director Michael York (left) appreciates the work variety: “One day you may be working on something for a statewide health system and the next day on pet crates for a local manufacturer. It’s really randomized as far as who our clients are and it makes it exciting.”



Encouraging words and a challenging puzzle are always on hand to help focus the mind.

research plans and outline objectives provides new layers of interaction with the analysts and the account executives.

“The end result has been much more thorough. We were always client focused but there is a new level of (internal) interaction now.”

Simmermon is a millennial – as is about a third of the staff. She feels that perspective helped her bring forth change elements that were not only helpful to attract and retain younger professionals but also good for business.

Two related mottos give insight to how she approached the transformation at SMARI. One is “always disrupt yourself. We want people to be comfortable with change. You have to be, because if you are (simply) comfortable (as things are), then you are behind.

“The other is do something every day that scares you. That’s helped me progress and challenge myself to move forward and change. Because if leadership isn’t comfortable with change, then you aren’t going anywhere,” she asserts.

“Our clients come to us because they want to outsource to capable hands. We are supposed to be those capable hands, know research better, have current tools and be on the (cutting) edge of the game – otherwise, they can do it. We always need to stay a step ahead, which goes along with always disrupting what you are doing.”

That attitude also extends to pursuing business. Until about a year ago, SMARI – rather amazingly – was 100% referral based. “We are just now marketing ourselves. We said, ‘Let’s not be the best kept secret anymore,’ ” Simmermon shares.

Big and little things matter

That willingness to embrace change and a challenge, says account manager Angelina Iturrian, is appealing to employees because they know that means they have opportunities for growth.

Explains Ittenbach, “One thing we’ve always tried to instill within our associates is that they are empowered to kind of achieve whatever pathway to whatever extent that they want. We allow employees to explore and move forward – continuous learning and risk taking.”

SMARI presents employees with training options at the start of

each year. For those wanting to pursue advanced degrees, the company provides \$5,000 annually in tuition reimbursement. That’s how Simmermon got her MBA.

Iturrian, who already held a Ph.D. before joining the company last year, appreciates that mindset of continually striving.

“I love that I know I’m working with the highest caliber of people; it gets me excited about work and what I do. . . .They also do a lot to make people feel valued and around helping each other out.”

This and the overall culture is why she chose SMARI from a variety of offers.

“Everyone has a voice in what happens here,” York emphasizes. “We also understand that it’s the little things that allow people to feel invested.”

The daily touch point meetings at 9 a.m. assure that if someone is overwhelmed, others less busy can assist.

In addition to the open environment, camaraderie is elevated through a series of fun activities throughout the year – both inside and outside the office. For St. Patrick’s Day, Simmermon wanted to give everyone the day off for her favorite holiday. Instead, the team wanted to come to work in the morning and then go celebrate together for the bulk of the day. “That spoke volumes,” she declares.

Summertime is especially welcome at SMARI. Every Friday work ceases at noon and employees are released early.

“People will work harder during the week to take that half day. We actually see greater work product, greater enthusiasm,” Simmermon insists. “It’s the passion for work that you do that really makes the product better for our clients, and we see that come out when we do stuff like this. So if people enjoy their work, they do a better job.”

And what they do isn’t easy or the result cookie-cutter. “Our clients come to us not because here is a market research product. It’s the strategy, it’s the complex thinking, it’s the abstract reasoning, it’s the customization behind it,” Simmermon surmises.

“When you have a whole team of talented people who are enthusiastic about finding the answer and working hard to find that answer and you are part of that, it makes it so much fun.”