



**PERCIPIENT**  
STRATEGIES

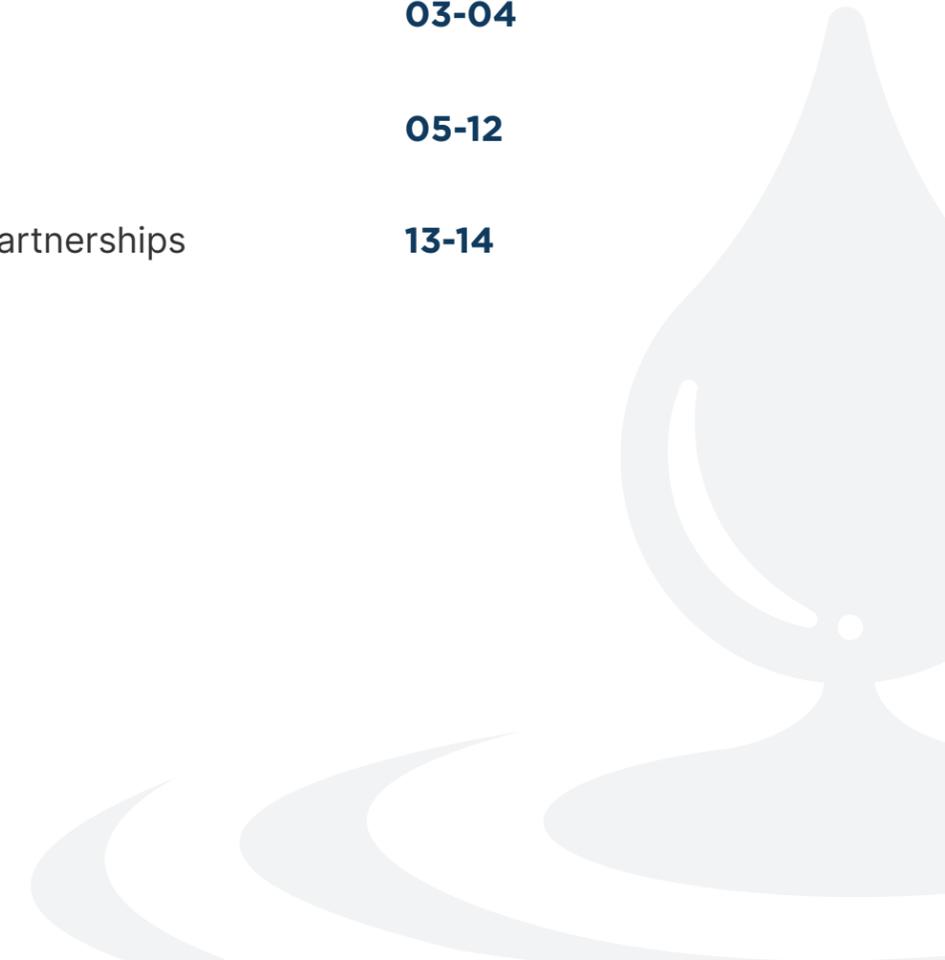


**Drive.  
Substance.  
Value.**

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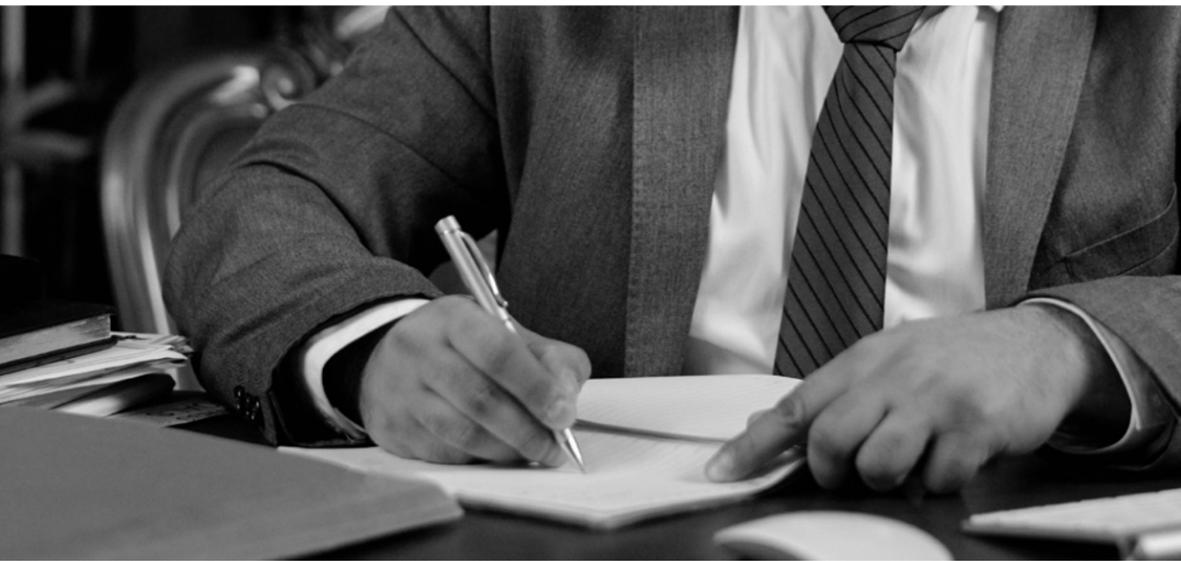


# About the Company

Percipient Strategies LLC is a full-service research firm specializing in political intelligence and due diligence.

Our experts not only collect and analyze critical information for our clients but distill exceptional insights that have proven to be the winning difference for campaigns, business decisions, and litigation.

Drawing on a successful record consulting for over 100 political, corporate, and non-profit clients since 2016, our team leverages honed insights, client-first service, and in-house tools to deliver actionable insights to stakeholders in any situation, whenever necessary.



“Ensuring accountability, responsiveness, and discretion is central to the Percipient ethos a singular focus on helping our clients succeed.”

# Leadership

Elite, battle-tested experts with success in diverse environments form the core of Percipient Strategies. Our experts have been counted on to deliver incisive research that has oftentimes proven the winning difference for our clients at every level of politics, business, and litigation.

Percipient is led by our three partners, who personally spearhead every project, and are assisted by a dedicated team of researchers.



## MATTHEW ALONSOZANA

Matt guides a cohort of elite political researchers and experts as the co-founder and Managing Partner of Percipient Strategies LLC. Since 2016, Matt has helmed Percipient as it has grown from a nascent research start-up to a nationally recognized provider of political research and public affairs due diligence services. Beyond coordinating Percipient’s overall operations and strategic partnerships, Matt personally oversees each Percipient project – ensuring an attention to detail and client dedication for which the firm has become known.

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## NAJI FILALI

Naji steers an industry-leading public record acquisition team as co-founder and Partner at Percipient Strategies LLC. Naji has developed unrivaled insights into state-specific public information statutes to deliver, analyze, and discern political and reputational salience for Percipient clients from records maintained across thousands of municipal, state, and federal record repositories. Mirroring his national footprint, Naji has also spearheaded the cultivation of business relationships with clients across several dozen states to solidify Percipient’s brand of high caliber political and public affairs research.

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## TYLER ROSS

Tyler, a Partner at Percipient Strategies, coordinates the firm’s external communications campaigns and media engagement endeavors. Tyler joined Percipient in 2018 after serving as the Deputy Director of Media Affairs at The White House, where he oversaw regional and local media outreach across the country for the Administration’s strategic communications objectives. Similar to many of Washington’s stronger communicators, Tyler spent years sharpening his communications skillset in research and intelligence-driven roles, including positions at the White House, Republican National Committee, and Capitol Hill.

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# Services

Percipient Strategies leverages a unique and determined approach to research. Our team excels in open-source research complemented by a deep understanding of current socio-political trends, technological advances, and investigatory techniques resulting in a holistic service offering that delivers breakthrough, actionable insights to political and business clients alike.

## 01 POLITICAL RESEARCH & CAMPAIGN CONSULTING



### Archival and Media Content Examination

Percipient conducts an exhaustive review of statements, mentions, positions, events, etc. across historical and current publications and channels.



### Holistic Policy Analysis

Percipient discerns any relevant policy and issue stances over time and across roles for individuals, groups, and organizations, including in depth legislative analysis.



### Intensive Personal and Campaign Vetting

Percipient investigates all potential personal, family, financial, campaign, career, assets, and property sources to identify any potential vulnerabilities.



### Deep-Dive Public Record Review

Percipient collects and analyzes difficult to obtain federal, state, and local records along with controversial criminal, civil, and legal records.



### Proprietary Social Media Analysis

Percipient utilizes a proprietary social media search to gather any actionable information across accounts and with specific individuals.



### Retainer Rapid Response Services

Percipient responds quickly to events and changes in the media landscape with on-demand briefings, post verification, vetting, and preparation.

## 02 VETTING & DUE DILIGENCE



### Mass Vetting Services

Percipient offers a condensed version of its political research skillset to help clients across industry sectors identify potential matters of consideration for large groups ranging from several dozen to several hundred entities.



### Reputational Due Diligence

Percipient conducts a holistic review of entities (inclusive of news, financial, and public records) to help clients perform reputational due diligence and compliance ahead of sensitive decisions and potential partnerships.



### Organizational and Business Investigations

Percipient engages in thorough analysis of organizations and businesses to help identify any reputational, operational, and financial considerations from open-source information in order to assist clients with strategic considerations.

## 03 ISSUE MANAGEMENT



### Policy Research

Percipient produces in-depth analyses of policy issues in a clear, concise, and cogent manner that not only works to build support for client positions but also highlights additional matters for consideration such as preexisting public perception, weaknesses in opposing arguments, and vetting of subject matter experts.



### Industry Research

Percipient assists in the development of business strategy by helping Zresearch industry-specific information (such as government datasets) and conducting competitor analyses.

# Case Study: Opposition Research

# 01



*How Percipient Strategies holistic approach to opposition research helped eke out a major primary win for a campaign for U.S. Congress.*

## OVERVIEW

Percipient Strategies views opposition research as a holistic, ever-evolving exercise. Successful execution of opposition research requires not only a deep dive on fundamental information but also being responsive to client needs and the dynamic conditions on the ground. The time has long since passed when research consultants could pass off static documents with superficial analyses as “good work.”

In a 2020 campaign for U.S. Congress, we brought our full research competency to bear. We undertook a comprehensive review of an opponent across personal, legislative, and professional angles, discerned impactful information distilled into concrete criticisms, and helped verify creative content built on our findings.

This approach not only provided immense value to the client whose team went on to win the contested primary but also uncovered previously unknown information about the opponent, which severely impacted their ability to stay on message and re-brand.

“Across several campaigns, we’ve seen how opposition research can be the difference in tightly contested races. When our client jumped into the 2020 primary for Congress, we knew we had to generate hugely impactful information to compliment his core strengths while contrasted against his opponent’s vulnerabilities. This work truly represents Percipient’s ability to generate value across issues and situations.”

-Naji Filali, Partner at Percipient Strategies

## APPROACH

### PUBLIC RECORDS RESEARCH WAS CRITICAL:

Despite the opponent’s status as a well-known public official, our deep-dive, comprehensive records research uncovered previously unknown personal and financial issues that contrasted directly against the opponent’s record of leadership and fiscal responsibility such as previously unknown police run-ins and court filings.

### RESPONSIVE TO CONDITIONS ON THE GROUND:

Our team spent significant time discerning ways by which our opponent had broken with the local base and constituency, particularly in regard to professional activities and campaign finance snafus, including supporting members of the opposing party.

### INTENSIVE POLICY EXAMINATION:

Re-examination of the opponent’s legislative record unveiled tax increases and other actions that cut against claims of lowering fiscal burdens.

## RESULTS

**30%**  
MARGIN OF VICTORY  
realized by client and team despite opponent holding early leads

**+100**  
NEWS & MEDIA STORIES  
mentioning research derived content during primary campaign

**+ \$3**  
MILLION  
in media exposure (earned and unearned) from research-derived content

## CONCLUSION

Percipient Strategies’ research can have a direct impact on a client’s success with our holistic approach to research. We value constant client interaction and partnerships to help discern the most meaningful content for campaigns. Percipient Strategies has combined these elements to help countless clients realize success from the local to state and presidential levels of politics.



# 02

## Case Study: Ballot Measure



*How Percipient Strategies used its research core competency to help drive messaging for a multi-million ballot initiative in the Commonwealth of Massachusetts.*

### OVERVIEW

People oftentimes confine research to direct candidate comparisons in political campaigns: "Let's hire the researchers to understand vulnerabilities for Candidate X." However, we know that research has a variety of applications for any political endeavor, including ballot measure campaigns.

During the 2020 election cycle, we were engaged by the leaders on one side of a multi-million dollar ballot measure in the Commonwealth of Massachusetts to help develop and drive messaging to directly appeal to voters statewide. To realize value for our client, we decided to undertake a holistic review of the situation at hand and of the opposing side's historical arguments – a variation on our core competency in opposition research.

"Research, writ-large, is a fundamental aspect of any political or public affairs campaign. When we work with clients outside of the typical opposition research context, we use our battle-tested skill set and re-apply it to match the situation at hand. Our work in Massachusetts not only demonstrates our team's strength in being responsive but also in creatively generating value in any context."

-Tyler Ross, Partner at Percipient Strategies

### APPROACH

#### DIRECTLY CHALLENGING THE VALIDITY OF OPPOSING SIDE'S ARGUMENTS:

Rather than accepting the opposition's arguments as a given, we helped our client point out that opponents' messaging was not only hypocritical but also self-serving by comparing archival statements and undertaking a review of industry research and financial briefings.

#### PREPARING DEFENSIVE CONTENT:

Anticipating opponents' arguments, we helped our client prepare content that defended their position by noting other organizations who also broadly backed their stances.

#### READY TO RAPIDLY RESPOND:

Amid an onslaught of ad-spending by opponents, we were available in real-time to develop pushback content to help show that opponents' tactics were effectively fear-mongering and re-hashing of unsubstantiated fears.

### RESULTS

<p><b>50%</b> MARGIN OF VICTORY</p> <p>by client and team despite being outspent by opponent by millions of dollars</p>	<p><b>&lt; 24 HRS.</b> RESPONSE TIME</p> <p>in generating pushback content against opponent's massive negative ad campaign, with full sourcing and citations</p>	<p><b>+1000%</b> ROI</p> <p>when considering value of earned and unearned media coverage utilizing research-derived content within first 2 weeks of engagement</p>
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### CONCLUSION

Percipient Strategies is able to engage with clients outside of its opposition research core competency, particularly with ballot measures and public affairs campaigns. We utilized our expertise in MA to derive offensive and defensive content to help our client viscerally appeal to voters in a seemingly esoteric policy matter. We have a record of success in helping synthesize impactful information for several other clients across the U.S.

# Case Study: Vetting Services

## 03



*How Percipient Strategies' expansive and responsive research skillset empowered the vetting operations for the Finance Department of the Republican National Committee.*

### OVERVIEW

While Percipient Strategies has developed a reputation for incisive opposition research and political intelligence operations, we are also able to apply our skillset more broadly and at-scale to conduct mass vetting operations. Faced with the challenge of assessing any public relations issues and compliance requirements for its major donors, the Republican National Committee (RNC) in 2020 was tasked with potentially vetting over 4,000 individuals, entities, and venues in the latter part of the 2020 election cycle just in its Finance Department – an immense and highly-sensitive challenge.

By utilizing our research expertise, specialized operations, and proprietary tools, we optimized ourselves to handle huge volumes of vetting research and executing such research in an expedient manner – an unparalleled functionality within the political research industry.

"Percipient Strategies has developed industry-leading practices that not only allow us to execute award-winning in-depth work but also set industry-leading practices for mass vetting operations for political and public affairs clients. Our approach, which combines intensive research, unbeatable responsiveness, and client interfacing, results in a vetting service that not only highlights PR and compliance matters for consideration but acts as an immense value-added insurance policy against negative earned media coverage."

-Matt Alonzoana, Managing Partner at Percipient Strategies

### APPROACH

#### ESTABLISHING CLEAR VETTING PARAMETERS AND DEDICATED REQUEST PROCEDURES:

We worked with RNC stakeholders to identify issues of note on PR and compliance levels and also established unique procedures to request reports, thus ensuring both an impactful report but also ease of use.

#### UTILIZING PERCIPIENT'S INDUSTRY-LEADING RESEARCH PRACTICES:

With teams dedicated to public records, news, and social media research, we were able to offer reports at scale without a loss of quality or responsiveness.

#### LEADERSHIP-LED QUALITY CONTROL:

A Percipient partner not only acted as a dedicated client contact but also directly ensured quality with each report and follow-up in the event of needed details or clarifications

### RESULTS

**+ 4000**  
**VETTING REPORTS**  
**PROCESSED**

inclusive of reports on individuals, companies, venues, and locations during span of contract

**90%**  
**RATE OF SUBMISSION**  
**WITHIN 24 HOURS**

and a 100% rate of submission within 72 hours from November 2019 – November 2020

**+ \$100**  
**MILLION IN NEGATIVE**  
**EARNED MEDIA**  
**COVERAGE AVOIDED**

when considering public relations and legal matters avoided after vetting reports were considered in event planning and announcements

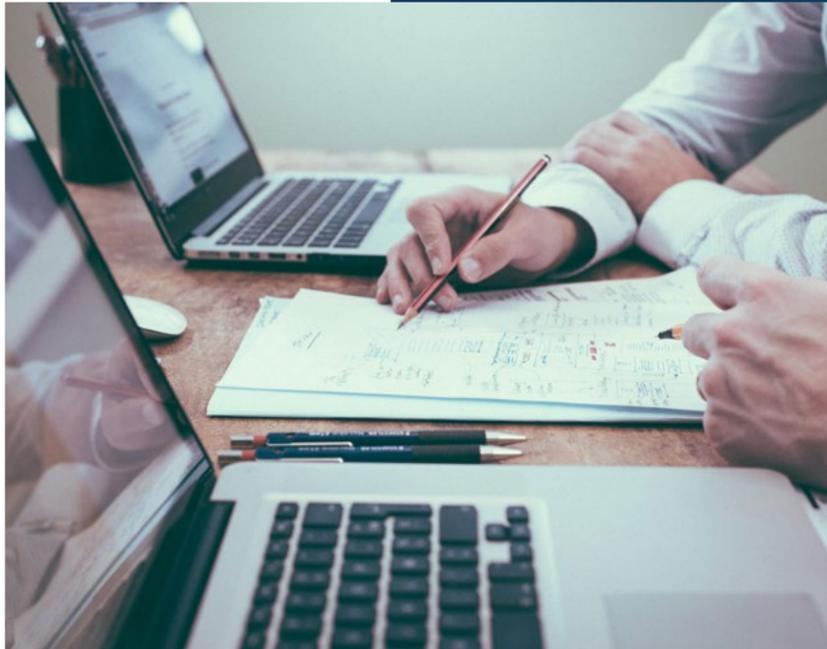
### CONCLUSION

Percipient Strategies sets the bar for the industry when it comes to mass vetting operations. Being able to offer our skillset at scale means that major clients can survey large groups for potential issues, resulting in an effective insurance policy against several negative earned media risks and compliance issues.



# 04

## Case Study: Industry Analysis



### OVERVIEW

Research, as a skillset, is not confined only to the political and quasi-political realms. Assessment of the situation at hand, gathering of pertinent information, and analyzing facts to discern strategy are skills that fundamentally drive all decision-making activities, particularly in the corporate arena.

In 2017, a major Midwestern hospital system was confronted with the immense challenge of preparing for a significant change in operations – consolidating services and responding to rapidly changing demographics within its local service area.

Though the fundamental operations of how to undertake such a task was well-understood, it was less clear what other peer and competitor systems had undertaken and how to best prepare its public and community relations activities. Percipient Strategies was hired to help elucidate information that could provide greater insight on the system's strategic planning in this regard. We decided to undertake a national and archival review of hospitals and health systems in similar circumstances, a review of current conditions in the health care sector, and an in-depth look at peer institutions to help discern best practices.

"As a research consultant, our firm is oftentimes entrusted with discerning information in a variety of settings outside political war rooms and oftentimes in corporate boardrooms. We produce in-depth, fact-based reports that have helped Fortune 100 clients and other multi-billion dollar entities with their strategic planning and due diligence considerations."

-Matt Alonsozana, Partner at Percipient Strategies

*How Percipient Strategies used its research skillset to help discern corporate strategy and public relations considerations for a major Midwestern hospital system.*

### APPROACH

#### OVERARCHING REVIEW OF CONDITIONS IN HEALTH SECTOR AND HOSPITAL INDUSTRY

firmly situated our client's actions within the context of national trends and challenges exhibited in other communities

#### IN-DEPTH EXAMINATION OF PEER INSTITUTIONS

allowed for the composition of case studies to discern distinct best and worst practices

#### ARCHIVAL ANALYSIS OF SIMILAR SITUATIONS

resulted in hundreds of examples of similar situations to give an industry-level review of general practices

#### DATA VISUALIZATIONS OF COLLECTED INFORMATION

assisted in comprehension not only for internal stakeholders but also for community leaders

### RESULTS

**+ 300**  
HOSPITAL SYSTEMS  
REVIEWED  
for similar situations and actions

**12**  
IN-DEPTH CASE  
STUDIES PRODUCED  
for analysis of best and worst practices

**~\$75,000**  
IN COST SAVINGS  
realized by client as a result of using Percipient Strategies compared to other business or PR consulting firms



### CONCLUSION

Percipient Strategies is able to creatively apply itself and help clients realize value, even in the corporate and industrial space. Our client-centered ethos means that we are able to gather meaningful information throughout the research process that results in the most value in our deliverables. Our team's work product and value-add are comparable to those from strategic consulting firms and allows for significant cost savings.

# Recent Results

In the 2020 election cycle alone, Percipient Strategies produced:

**+25,000**  
PAGES OF  
ORIGINAL RESEARCH

**+3000**  
PUBLIC RECORDS  
REQUESTS

**+ \$50**  
MILLION EARNED MEDIA  
COVERAGE FROM  
RESEARCH-DERIVED  
CONTENT



Thus, our team helped deliver **over 75 wins across 28 states** from 2019 – 2020 as a result of our political research operations, including:

- Greg Gianforte, Governor (MT)
- Stephen Richer, Recorder (Maricopa County, AZ)
- Ron Wright, U.S. House of Representatives (TX-06)
- Ronny Jackson, U.S. House of Representatives (TX-13)
- Victoria Spartz, U.S. House of Representatives (IN-05)
- Indiana Legislature (11 Wins)
- Ohio Legislature (25 Wins)
- North Carolina Legislature (7 Wins)
- Wisconsin Legislature (4 Wins)

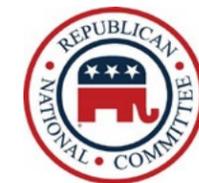
**Campaigns  
& Elections**

**WINNER**

2020 REED AWARD

“Best Use of Opposition Research”

## RECENT PUBLICLY ACKNOWLEDGED CLIENTS:





Ready to  
get started?

**CONTACT US**

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