## Merrill S. Shugoll

## Following the Breadcrumbs

Merrill was only 23 years old when she married Mark Shugoll, and though they didn't have much, her mother-in-law taught her to save the breadcrumbs they came across. "We were making so little when we first started out, but Joan also taught me to spend and invest wisely so that a dime becomes a dollar and a dollar becomes ten," Merrill recounts today. "She told me to give up just one thing a week and instead put that money into a 401(k). When I saw others act indiscriminately about how they spent their

money, I remembered that a dime might not seem like a lot, but if you save it, you can build a hundred times that much."

The one thing the young lovebirds did spend their money on was art. Instead of expensive anniversary presents, they vowed to invest that money in pieces of art that brought them joy. Himself the descendent of a famous Russian artist, Mark bought Merrill a glass heart one year because she had the best heart of anyone he knew. "In

those days, we had no furniture in our house, but we had art on the walls," Merrill laughs. "I joked with Mark that we should at least buy a bench and charge an admission fee."

In the same way that each dime and dollar breadcrumb led to financial security down the line, the breadcrumbs of those early art investments led Merrill and Mark to a lifetime of transformative arts philanthropy. And the practice of finding value in small things is the same philosophy that guides Merrill's work today. Now the President of Shugoll Research, a leading marketing research consulting, facilities, and recruiting services firm, shared stories are the breadcrumbs that lead her team to understanding what people think and care about. "I'm a naturally curious person, so I couldn't imagine a better profession," she says. "I love to learn about people and understand why they feel the way they do and behave the way they

do. As they tell stories about their lives, they leave breadcrumbs, and we follow that breadcrumb path to insight."

Shugoll Research was launched in 1957 by Joan Shugoll, Merrill's mother-in-law, at her kitchen table in New York. She had a one-way mirror—a relatively new concept at that time—installed in her home. When advertising agencies hired her to test various products and ideas, she would recruit people into her dining room to ask questions while clients observed from the other

side. "She's considered a pioneer in the business," Merrill remarks. "She was absolutely revered."

When Merrill joined forces with Joan in 1984, Shugoll was a firm of three employees and \$500,000 in revenue operating out of a home office. With the vision of creating a turnkey operation accountable for each step along the way to insight, they grew it to a firm of over a hundred employees and \$7.2 million in revenue, with two offices in some of DC's most

sought-after locations.

Today, the company's consulting division is dedicated to helping clients make better business decisions through comprehensive qualitative and quantitative marketing research, strategic consulting, and specialized expertise. "Typically, clients come to us with business challenges to solve or opportunities to take advantage of," she says. "Often they need to decide whether to make major capital investments. We help them by designing a study that will collect the intelligence they need to supplement management intuition and guide those business decisions."

The company's second major division, its facilities and recruiting division, is comprised of focus group facilities at both its Bethesda headquarters and its Old Town, Alexandria locations, a call center, and large respondent database. Specializing in data collection, the

division offers premier recruiting and project management services, as well as advanced virtual technology for research implementation. This section of the business is run by Rick Seale, the first non-Shugoll to own a portion of the company. "He's very devoted and does a wonderful job," Merrill says.

Shugoll's eclectic client base draws largely from the healthcare space, including hospitals interested in developing new programs or clinical and patient services, as well as the associations that populate the region. They've done product and advertising studies for banks, as well as work the U.S. Department of Energy, the Environmental Protection Agency, the Alliance to and several Energy, CLASP environmental organizations. Shugoll also has a very active practice in the arts, giving back to the community by underwriting costs for nonprofit clients like theaters, opera companies, symphonies, and museums. "Nonprofits are seeing more and more that pricing studies and market intelligence are more than worth the upfront investment because they allow for the capture of significantly higher revenue," Merrill points out. "That's the Shugoll difference."

This diverse client base has lent Shugoll remarkable resilience over the years. In the early 1980s, the firm was kept busy with real estate work by the region's large developers, as it was kept busy in the 1990s by telecommunications giants. When those sectors faced their successive busts, the firm's healthcare and associations work smoothed out the troughs. Its strength also comes from the attention and care it pays its employees, partners, clients, and research participants. "We listen to every story to find out how we can create supportive work environment, win-win partnerships, engaged participants, and intelligence that achieves our clients' business objectives," Merrill says. "We draw on the value of every perspective and every breadcrumb to make Shugoll the best it can be."

At its root, Merrill's excellence comes from the genuine interest and openness she demonstrates to everyone she meets—a quality cultivated by the home she grew up in. "Thanks to my mother's welcoming spirit, our house was the house for everyone," she remembers. "If someone had a big fight with their parents and needed a place to stay, they stayed with us. If they needed a good meal, they knew to come to my mother, because she was the best cook and always welcomed them. She made it widely known that her home was open all the time, so there were always friends and neighbors coming and going. We didn't have a lot of money, but our refrigerator was always full, and we had food for everyone."

Merrill was born in Queens and grew up the oldest of three children. Her father, typical of his era, was a tough working-class man with only a high school degree, but very smart in a practical sense. He had several dry cleaning and laundry businesses in Manhattan, while her mother was a bank teller, and they worked hard to make ends meet. When Merrill was seven, the family moved from their duplex in the city to the community of Wantagh on the south shore of Long Island, where she started first grade. "My mother had always wanted her own single-family home," Merrill says. "It was the American Dream, and the one asset that supported them through retirement."

Merrill remembers her parents fighting like cats and dogs, but they were incredibly devoted to one another. Her father loved to work, and kept a rigorous schedule late into his eighties. Her mother, self-educated and cultured, had a magnetic personality and always lit up any room. Her brother was well-behaved entrepreneurial, while her sister was spirited with a rebellious streak. The family was very close, including her mother's sister's family, who lived in Queens and visited several times a week. Merrill's two cousins were like another brother and sister to her, and they all enjoyed playing in the neighborhood together.

Growing up, Merrill loved school and was an excellent student, working hard for good grades in the subjects that were challenging for her. She took dance, played lacrosse, became a proficient pianist, and made her first buck working at a small department store. Her mother sometimes took the kids into Manhattan, where they'd go to the ballet or the theater. But her mother was often sick through her childhood, so her grandmother and aunt spent a lot of time helping out. "I can't even imagine what life would have been like without them," Merrill says. "My grandmother was the fabric of our entire family, and my aunt was a very smart and accomplished woman who encouraged me intellectually."

Another silver lining of her mother's health difficulties were the relationships of love and support that grew between Merrill and her siblings—relationships that remain indestructible to this day. As the oldest, Merrill became the adult of the family, a definitive experience that ingrained in her a maturity and sense of responsibility beyond her years. "I had to grow up fast, and it made me the person I am today," she says. "I became the person in my family that everyone turns to. I'm incredibly close to my two siblings, and my husband would probably say that I facilitate our closeness. I'm the glue."

Merrill's father didn't believe it was necessary for his children to pursue higher education, but her mother was adamant that they attend college, so he ultimately agreed. As Merrill neared high school graduation, her mother encouraged her to look into different colleges and universities she might be interested in, but at first, Merrill resisted. "Honestly, my parents had a very solid marriage toward the end of their lives, but at that time things were rocky," she remembers. "I had a fear that if I left home for college, they'd break up. I confided in my aunt about this, who helped me understand the importance of pursuing my education."

Thanks to her aunt's encouragement, Merrill took out loans and chose to attend American University for its strong language program. Because French had always been the hardest subject for her in school, she decided it would be her major, with Anthropology as her minor. "Why focus on the things that came easy to me?" she says. "When something is challenging for me, I figure it out. That's always been the kind of person I am." In college, she spent a year living in France and ultimately became fluent—a perfect example of her approach to life.

At American, Merrill met lifelong friends and got a job selling candy at the Kennedy Center, which allowed her to see free shows. Then, when she attended a party at age 21, Merrill met Mark, a handsome graduate student and Renaissance man with an incredible record collection. They struck up a conversation about music, and he invited her to an Allman Brothers concert. As fate would have it, Mark's parents used to bring their dry cleaning to her father's store in Westbury, New York, and their grandmothers used to play bingo together. They quickly became best friends, and before long, they realized they wanted it to be more.

Upon graduating from college in 1974, Merrill got a job with a French consulting company and married Mark in 1975. The following year, at Joan's suggestion, Merrill landed a job as a librarian for Henry J. Kaufman & Associates, a large and highly respected advertising agency in Washington. "I actually had to take a pay cut, but I knew I'd be surrounded by bright people in a fast-paced, demanding environment," she says. "They told me it would be the opportunity of a lifetime. It sounded too interesting to pass up."

With that, Merrill set off on a new path. Whenever the agency made a media buy, it was her job to make sure it was properly executed, cutting out the ad and pasting it into large black books for the firm's records. But she soon found she was able to complete her daily duties in about five minutes, so she decided to spend the rest of her time becoming a Librarian Extraordinaire. "I needed to do more," she remembers, echoing the work ethic of her father.

Soon, Merrill became the go-to person for quickly finding the esoteric pieces of information the agency's creative directors needed for their ads. "Through chutzpah and people skills, I'd find the answer to any question," she says. "They thought I was a miracle worker, but it was really just about identifying the right people who had ready access to that information. Then I wrote up a proposal for the CEO, Stuart Karu, requesting resources to transform the library into an information center. He resisted at first but ultimately agreed, and the center became invaluable to the agency."

Once Merrill had those skills down, she noticed that the agency would put together big pitches when they tried to land new accounts. The pitches required thorough research into the industry sector of the target client, and Merrill decided to get involved by doing the research for a U.S. Airways pitch. In the process, she realized the most valuable insights could only come from people. "I felt that we needed to be talking to people who actually flew on the airline, and those who chose not to," she says. "I brought this idea to the Director of Research, who was a quantitative person-in other words, a 'numbers gal.' She preferred to have me be the one facilitating group discussions and listening to consumers, so that's how I got my start in research."

Over the next eleven years, Merrill continued that work, rising through the ranks to become president of the firm's subsidiary company, the Market Research Bureau. She turned it into a for-profit division of the company,

soliciting business beyond agency clients. Then, after she had her first daughter, she decided that if she was going to work so hard, she might as well work for herself. "Stuart and I had a wonderful relationship, and he understood that I was ready to go out on my own," she says.

With that, Merrill decided to meet with her mother-in-law for advice. Joan offered to back Merrill if she wanted to start her own business, but she urged her to join Shugoll instead, diversifying the business into design and analytics. Merrill worried it might create conflict between them, but Joan offered to hire a mediator to help with any problem that might arise. "In the end, we never had to call the mediator once," Merrill recounts. "Joan and I are kindred spirits. She is my dearest friend, and one of the smartest people I have ever met. I can't describe how wonderful she is. Choosing to go to work for her was one of the most defining moments of my life."

Another defining moment came in 1988 when Merrill and Mark decided to adopt their youngest daughter, a baby from Korea. She was ready to come home when she was three months old, which happened to coincide with the 1988 Seoul Olympics. With the world watching, NBC journalist Bryant Gumbel commented that Korea exported its babies the way some countries export oil, prompting the South Korean government to immediately shut down its adoption program. Fortunately, Mark's father was a high-level international executive with partners in the country, and when Merrill decided to jump on a plane to bring her daughter home herself, a team of Koreans was ready to help her. "Our daughter is an incredibly special kid, and we're very lucky that everything worked out," Merrill smiles.

While many advise against mixing business and family, that very formula has been the alchemy of Shugoll's remarkable success. Mark joined the firm two years after Merrill, bringing along a huge multi-million-dollar, five-year government contract that prompted the company to update and formalize its accounting system. He headed up their quantitative division, and soon became the premier arts research consultant in the country. Later, in 2009, their oldest daughter joined the company. "She had always wanted to do it, but I never wanted her to be perceived as the owner's daughter, so I told her she had to earn her way," Merrill explains. "That meant working for a competitor and learning how they run their

research business, then getting an advanced degree, then working on the client side to master that point of view. After following all those steps, she still wanted to join us, and I'm so grateful to have her." And of course, there's Joan, the wonder woman who started it all. Now ninety years old, she still comes to work three days a week and remains Merrill's most important advisor.

Merrill's own parents, as well, had things to teach her late in life. As her mother aged, she grew so frail that she required assisted living, but her father refused to let her go alone. "He was still very sharp and able, but he sold the house and moved with her," Merrill recounts. "For the next five years, he did everything for her, just as she had taken care of him through their lives together. It was a really beautiful thing."

Married 42 years now, Merrill and Mark have a synchronicity so in tune that it's virtually unheard of. When they aren't at work together, they're at a ballet, theater production, art museum, concert, or sporting event, especially if it's a team from one of their daughters' schools. "People often ask how we've managed to live and work together so successfully for so long," she says. "What it comes down to, is that he really is my best friend, and I'm his. We're perfect complements for each other, and if given the choice, there isn't one thing we'd choose to do with anybody else."

Throughout their careers, Merrill and Mark have both been recognized as national leaders in their professional associations, which have since merged as the Insights Association. For Merrill, the 2013 Honorary Lifetime Achievement Award from the Marketing Research Association (MRA) stands out because it was bestowed by her peers. "Without a doubt, Merrill Shugoll is one of the greatest ambassadors our profession has had," gushed one nominator. "Whether she was being interviewed on NPR for a marketing research perspective on a specific story or adding her talents as a moderator to build consensus on a tedious issue during a committee or board meeting, she has been a pillar for the MRA. Our association and industry has had more changes in the past 18 months than in the prior 18 years. If it were not for this amazing woman's insight and leadership, I find it hard to imagine that MRA would be as strong and vibrant as it is today."

Merrill and Mark approach their arts philanthropy with the same energy they put toward their client work and industry service.

Merrill serves on the board of Signature Theatre, while Mark is a member of the Arts at Mason Board at George Mason University, the Business Committee for the Arts Board, and the Roundhouse Theatre Board, as well as former Chair of the Arena Stage Board. Most notably, in 1997, Mark created ArtSpeak!, a program to inspire middle and high school students to engage in the arts by bringing famous performers into schools. "Mark has always believed, and I agree wholeheartedly, that every child should be exposed to the arts," Merrill affirms. "It enriches your life and makes you a better person, with deeper empathy and understanding. We believe in art as a way for everyone to learn more about the world around them." Thanks to these efforts, Shugoll received a Washington Post award for Innovative Leadership in the Theatre Community and was recognized by Forbes Magazine as one of the best companies supporting the arts in America, among many other honors.

In advising young people entering the working world today, Merrill underscores the importance of seeking out mentors and professional organizations. "Becoming a member of a relevant association is a great way to network and meet others in the field," she says. "It's important to explore professional opportunities and learn from the people who have done what you want to do." An encouraging leader, she urges others to take on risks and challenges, supporting

them along the way and modeling the power of looking at a glass as half full instead of half empty.

But most of all, Merrill makes a point to nurture independent thinking and authenticity. "Be true to your work, your word, and your friend," she quotes, echoing the words of Henry David Thoreau. "My work is all about getting to the truth in this world, and we can only do that if people are connected to the truth within. So follow the breadcrumbs in your own life and heart. They will certainly lead you to what really matters."

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