

TAKING A STAND:

HOW CMOs AND CCOs ARE REDEFINING THEIR ROLES IN TODAY'S HIGHLY CHARGED SOCIAL, CULTURAL AND POLITICAL CLIMATE

This is the third study released by Peppercomm and the Institute for Public Relations (IPR). The [first study](#) in 2017 looked at how Chief Communications Officers (CCOs) and Chief Marketing Officers (CMOs) are operating in an era of uncertainty, polarization and false news with the new presidential administration. This 2018 follow-up study is an analysis based on in-depth interviews with 25 senior communications and marketing executives in large companies about how their roles and responsibilities are shifting in light of the current social, cultural and political landscape. What we found is while companies are more comfortable with uncertainty, they also are spending more time addressing social topics that may or may not be related to their core business, guided by their organizational principles and values. This is not a political piece advocating for any position; rather, this is a paper focused on what the interviewees reported.



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Methodology

Social issues are having a significant impact on organizations and their responses. In the past year, the Starbucks CEO hopped [a plane to Philadelphia](#) and closed 8,000 coffee shops to implement unconscious bias training after it was alleged a manager called the police on two patrons without justification. Patagonia's leadership spoke out when the protective status of the [Bear's Ears National Monument](#) was threatened. NBC [ousted](#) longtime morning host Matt Lauer following credible claims of sexual harassment amid the flood of the #MeToo movement. Media conglomerate [Viacom paused programming](#) on MTV, BET, Comedy Central, Nickelodeon and all its other networks for 17 minutes during the student walkouts in the aftermath of the school shooting in Parkland, Florida.

The public relations and communications industry is experiencing unprecedented times, sparked by major cultural movements, social activism, political divisiveness and an unpredictable presidential administration – all amplified by social media and a 24/7 news cycle. A poor response can have a serious impact not only on a company's reputation, but also its bottom line. A [consumer boycott](#), a [whistleblowing employee](#) or an influencer's [dismissive social media post](#) proved to have devastating consequences for brands, sending stock prices tumbling.

Increasingly, there is an expectation for executive leadership and organizations across industries to take a stand on major issues of the day. A recent study found more than 80 percent of consumers believe corporations should take action on important issues. Seventy-six percent said businesses should stand up for their political beliefs, whether or not they're controversial. Consumers also want swift action, with 52 percent of respondents saying a company should respond to an event within 24 hours ([Global Strategy Group](#)).

But what about the CEOs?

A recent [Fortune survey](#) of 60 CEOs who, when asked about their greatest threat, cited potential government actions of one form or another. The group mostly fell into two camps.

The first camp worried that the president will spark a trade war (9), a geopolitical conflict (5) or simply said "Trump" was the greatest threat to their business (2).

The second camp pointed to rising federal, state or local regulation (12). An additional corporate chief said the biggest threat was a "reversal of Trump" policies, and another cited "ESG (environment, social and governance) beliefs not based on reality."

The CEO findings reinforce what we uncovered; namely, that CCOs and CMOs better be ready when their chief executive calls and says "how do I respond?"

In this 2018 report conducted by [Peppercomm](#) and the [Institute for Public Relations](#) (IPR), we interviewed 25 Chief Communications Officers (CCOs), Chief Marketing Officers (CMOs) and other executives responsible for brand reputation and goodwill to find out how they are dealing with these changing times and whether they are shifting their strategies. We asked whether they are rethinking the ways they prepare for the unexpected, as well as considering and implementing new practices to determine if, when and how to speak out on issues of the day. After conducting interviews with candidates, we ensured their confidentiality, transcribed the interviews and grouped them according to key themes. These key themes formed the basis for this report and we included quotes throughout.

“NO INDUSTRY IS IMMUNE”: AN ACCEPTANCE OF UNCERTAINTY

One year ago, when Peppercomm and IPR last conducted this type of research, CMOs and CCOs expressed a sense of anxiety and uncertainty around the changing nature of our social, cultural and political world. For some, that anxiety remains. However, while most leaders are still uneasy about the new challenges they are facing, they are more comfortable with unpredictability and feel more prepared to maintain composure and figure out solutions to protect the reputation of their organization.

Regardless of their political views, many communications and marketing leaders still see the current presidential administration as a source of anxiety and uncertainty. This environment is unprecedented for them and, in many cases, they find it hard to anticipate what President Trump is going to do.

“People are now accustomed to the fact that we’ve got this ‘disrupter in chief,’” said one political and communications strategist. “I think there’s been a moment now where we – the country and the corporate culture – are starting to catch our breath, or at least learning how to hyperventilate steadily. And in that moment, [marketers and communicators] are trying to figure out how to look ahead as opposed to just being reactive.”

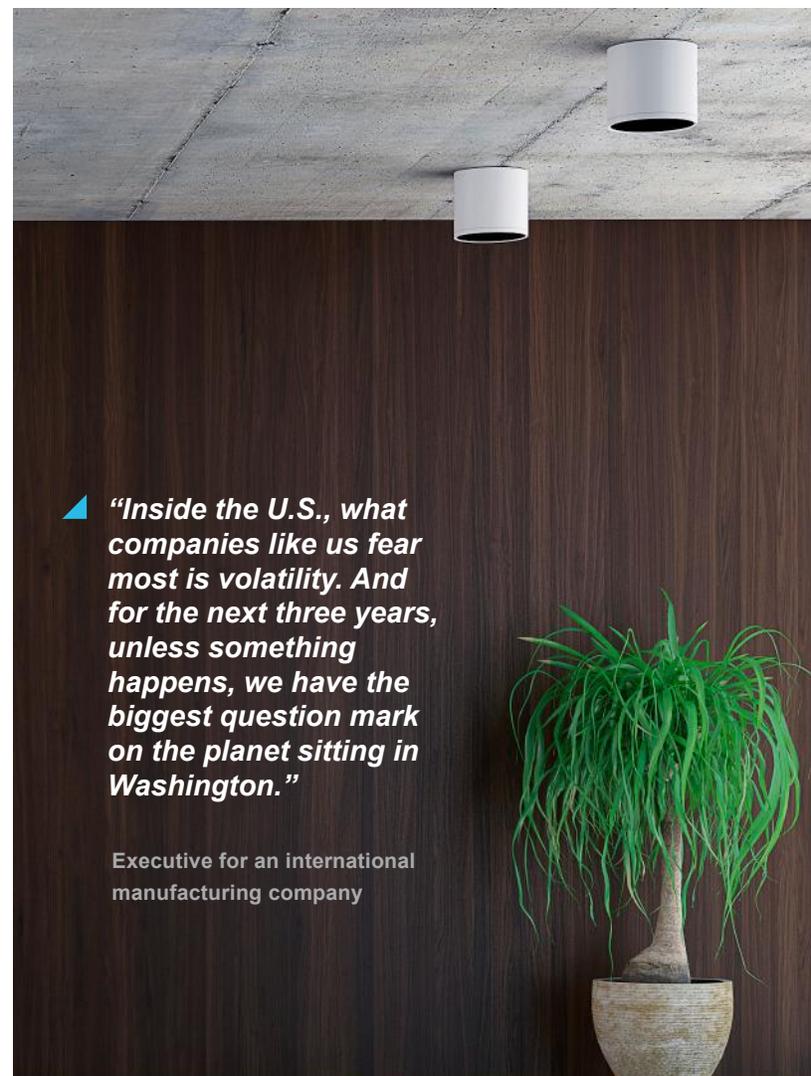
An executive for an international manufacturing company added, “Inside the U.S., what companies like us fear most is volatility. And for the next three years, unless something happens, we have the biggest question mark on the planet sitting in Washington.”

In many cases, marketing and communications leaders have to some degree weighed the likelihood of a public attack by the presidential administration or a particular social activist group. Executives take into account the nature of their business as a key indicator of whether or not their organization or leadership might become the target of a public crisis.

“We sell packaged snack foods. He [President Trump] isn’t coming after us,” said one executive. Others, especially from more regulated industries such as finance and healthcare, expressed a belief that every company is vulnerable. One communications executive from the healthcare field noted, “Current events such as sexual misconduct, kneeling during the national anthem, changes to the Affordable Care Act. . . I think all of it is affecting us. No industry is immune.”

Some weighed their options of how much they should communicate. One CCO of a software company said, “We’re cognizant that not everybody would share our opinion on tax reform, given the benefits it provides to our company. I think people and employees have an appreciation for that. But that means you have to consider just how visible you’re going to be.”

All the CCOs and CMOs who addressed the tax reform bill said what was most important was communicating the value of the changes and benefits to their employees. One CCO of a technology company said, “We tried to be very clear about why we took the position we did and the impact that will have on our company. We can continue to invest in creating and developing quality jobs. We pay well. We are an employer of choice and we connected that issue [of tax reform] with our ability to continue to provide really solid benefits.”



▲ ***“Inside the U.S., what companies like us fear most is volatility. And for the next three years, unless something happens, we have the biggest question mark on the planet sitting in Washington.”***

Executive for an international manufacturing company

EMPLOYEES DEMAND ACTION

Increasing numbers of Americans are passionate and vocal about social, cultural and political issues and many are encouraging, and in some cases demanding, their employers speak out. In fact, a recent [Glassdoor study](#) found that 62 percent of employees of all ages expect their employer to take a stand on major issues of the day. Employees are playing a pivotal role in pushing companies to become more proactive when it comes to communicating about issues.

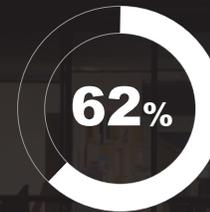
Organizations that have taken a public stand on controversial issues – or at least have considered doing so – often cited internal pressure as the catalyst. “Employees are now increasingly expecting companies to use their position to take a stand on those [issues],” said a CCO for a major technology company based in Silicon Valley. “We’ve been faced with that numerous times over the last year, where there’s been something in the news, not exclusively, but usually started by something that happened in the White House. And then we have to make the decision, ‘Do we respond or not respond?’”

Often, communications executives noted their leaders were more comfortable addressing controversial topics with internal audiences than they were going public with a specific position. Executives we spoke with cited issues such as the immigration ban and the anti-transgender bathroom bill as key examples where employees encouraged leadership to share their perspective and, in some cases, demanded their employer take action and make a public statement.

One CCO from a healthcare network noted, “We try to be as transparent as we possibly can. We try really hard to remain politically neutral and talk to our employees and help them understand why we were doing what we were doing. With the travel ban, for example, we were proactive about communicating the impact and the magnitude of those decisions on the healthcare industry. Among our medical students, we have a lot of fellows and we have visiting professors [from impacted countries].”



glassdoor



of employees of all ages expect their employer to take a stand on major issues of the day

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CCO from a healthcare network

In return, organizations are taking a more proactive approach to employee communications, though the specifics differ from company to company. Some noted a heightened attention to internal communications and providing more opportunity for dialogue with employees, especially within larger companies with distributed workers. Nearly one in three participants noted they are increasingly relying on their employee resource groups (ERGs) to communicate and build programming around related issues.

“We have ERGs and allies,” said the top communications executive for a consumer goods company, citing LGBTQ, African American and Muslim ERGs within her organization. “As an example, I’m an ally of our LGBTQ ERG. We came together for a moment of silence when [the shooting] happened in Orlando. We do not put out position statements on Trump or what’s going on in the world, but we constantly remind colleagues that we are a safe place. You can bring your authentic self to work. You don’t have to worry that if you are laying down your prayer rug that you are going to be judged or hassled.”

Other communications executives, particularly from large companies with a diverse employee base, emphasized

their (or their CEO’s) decision to stay away from any divisive positions, noting the risk of alienating internal and, potentially, external groups. The CCO of an international software company recounted, “I was with the CEO when Trump won. There were a number of employees who were in tears. One of the employees asked the CEO directly, ‘Can you please send a note out to employees, trying to reassure us that life’s going to be okay despite this election?’ Thankfully, our CEO is thoughtful and strategic. Although we’re based in [Silicon] Valley and a large number of our employees lean liberal, we also have offices in the Midwest and the South, and it’s a different demographic. Our CEO was very well aware, just from recent trips during the campaigns, that half of our employees support Trump. So the CEO knew coming out with an opinion, one way or the other, would alienate half the employees. So we chose not to send an email at that time, but it was an example of how we are very mindful of our employee base and these polarizing issues.”

Communicating internally is as important – and sometimes more important – than communicating externally. The need to balance the company’s point of view for a polarized set of internal stakeholders is key.



CMOs, CCOs AND CEOs REVIEW AND REFRESH CRISIS PREPAREDNESS PLANS

CCOs and CMOs said they have to be prepared and ready for a crisis to strike at any moment. One communications executive put it this way: “We’re in an extraordinarily polarized and disrupted era. We look at it as disruption across five sectors: economic, institutional, cultural, informational and political. And in each one of those areas, American life is undergoing so much rapid change, such decline in trust and so much uncertainty that CEOs and the C-suite are under siege or feel as though they could be under siege with a moment’s notice. And that’s largely the right feeling to have.”

Given the current social and political landscape, the vast majority of the executives interviewed recognize this cultural shift and its impact on their work. Some interviewees said these new unpredictable challenges have increased credibility in the profession and, increasingly, CEOs and other members of the C-suite are looking to the CMO and CCO for guidance and action.

“It’s normally me who leads a conversation with our executive committee to determine what the appropriate response is to [a particular issue],” said the head of communications for a multinational technology conglomerate. “That could be a conversation directly with my boss who’s our chairman and CEO. It could be a conversation with our CHRO if the issue is appropriate for that. It could include our CFO. It depends on what the matter is.” Similarly, many other participants noted that they have strengthened relationships with their C-suite and counseled members regularly on the topics of the day.

Interviewees also said they are providing heightened levels of counsel to their executives before a crisis hits. Many said they have reviewed and updated their communications plans so they are ready when the next one strikes. Others have constructed new, more sophisticated vetting procedures to evaluate when and how to respond to issues that directly or indirectly impact their business. One corporate communications leader from a building materials manufacturer noted that his team “kicked the tires” on their former crisis preparedness plan and evaluated a number of new scenarios: “We did the scenario planning and determined the tipping point for when our business units [pass the leadership] to me at a corporate level and I own it as a major crisis. We have to plan for small things becoming big things in a way that you normally wouldn’t in a regular crisis plan.”



▲ ***“We have to plan for small things becoming big things in a way that you normally wouldn’t in a regular crisis plan.”***

CCO from a building materials manufacturer

Some executives are increasingly relying on government affairs teams to give them warning on legislative, regulatory and other government-related issues that may be coming. Multiple executives noted a handoff in responsibility when dealing with anything related to politics. Said one tech CCO, “We were always reacting. We’d see others reacting and we’d go, ‘Oh, we have to come up with a point of view on this.’ So what we’ve done is set up a mechanism with our government affairs team in Washington D.C. who often get wind of what’s brewing before it actually happens.”

Others, including one insurance executive, take it on a case-by-case basis. “Depending on the topic, we may respond to the administration through our relationships and back channels. In other cases, we would talk to customers and employees and give them our perspective, but we’re never going to get into a Twitter war.”

Those who had been called out by the administration activated their networks to help manage the situation. One technology CEO said, “It was a holistic response. We used our relationships through the government relations team in Washington to have conversations.

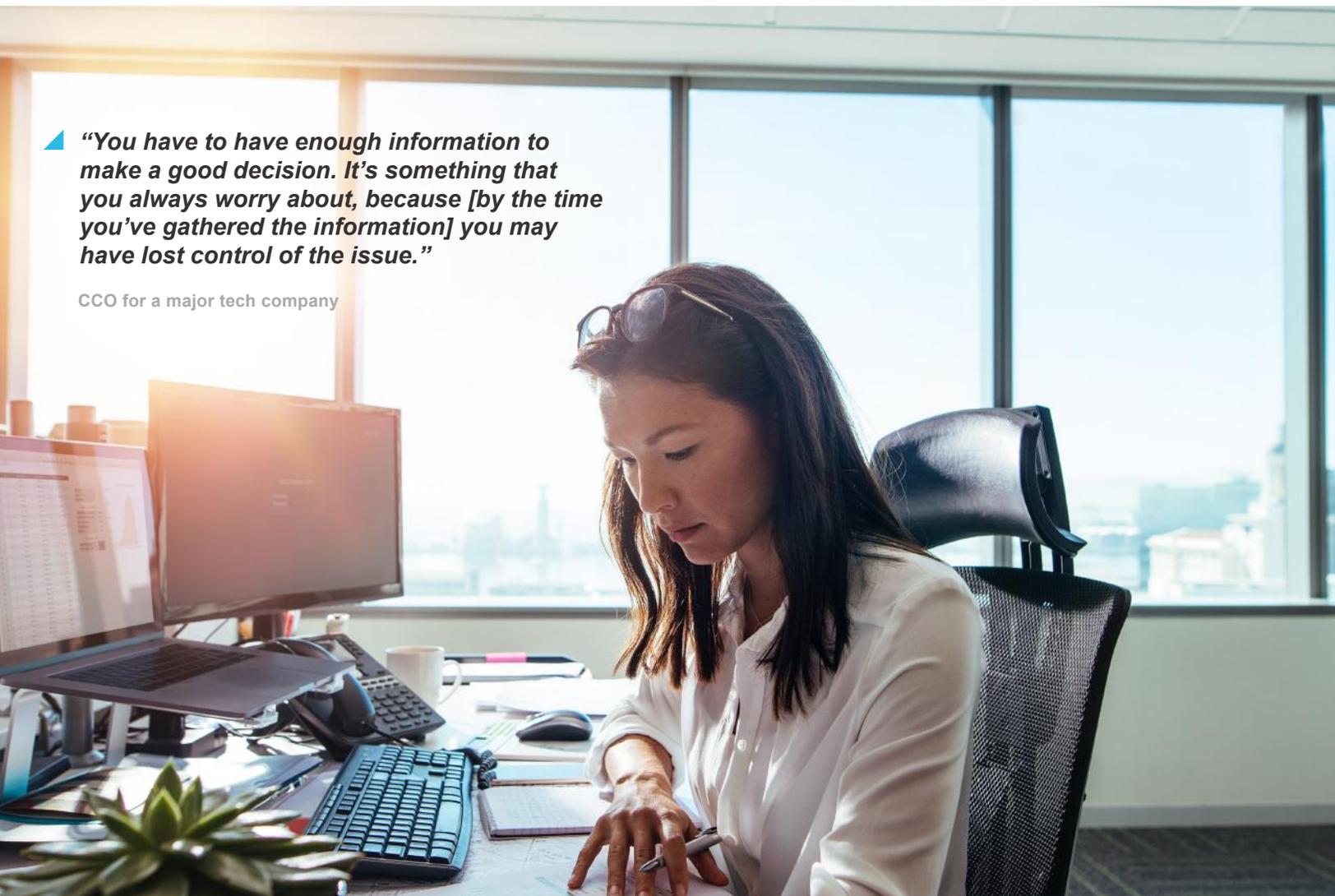
Once the agreement was reached, we wanted to be really clear about the facts the president was eager to communicate - that he had saved jobs. While we didn’t want to get in the way of that, we wanted to make sure people really understood what the truth was, so there weren’t disagreements later.”

In any case, executives realize the need for rapid response. Many are leveraging different monitoring tools to keep their finger on the pulse of social, cultural and political movements. They know they cannot wait hours to respond to an issue because it will quickly blow up via social media. “We do monitoring much more in real-time,” confirmed the CCO for a major tech company. “That’s always part of the pressure because you have to make decisions very quickly, and you have to have enough information to make a good decision. It’s something that you always worry about, because [by the time you’ve gathered the information] you may have lost control of the issue.”

While the degree to which marketers and communicators are revamping crisis and issues management protocols varies, all of the 25 executives we interviewed indicated they have at least revisited or reconsidered their approach in the past year.

▲ ***“You have to have enough information to make a good decision. It’s something that you always worry about, because [by the time you’ve gathered the information] you may have lost control of the issue.”***

CCO for a major tech company



CMOs AND CCOs, CHAMPIONS OF THE TRUTH

While not every instance is as high-profile as “Pizzagate,” false news is still top of mind for communicators. Whether it’s an intentionally inaccurate claim against an executive or company that spreads on social media or simply a case of sloppy journalism, mischaracterizations of the facts have caused a number of organizations headaches over the past year. When asked how they determine if or how to respond to an issue or crisis (false news or otherwise), many of the participants noted that fact-finding was essential. Clarifying misinformation was often the first (and sometimes only) step they would take on any polarizing issue.

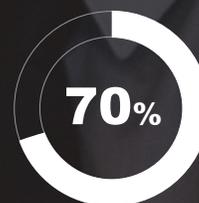
“The first thing that we do is to ground ourselves in the facts,” said one CCO from a major healthcare provider. “The second thing after we ground ourselves in the facts is determine what action, if any, should we take. We go through that whole matrix and try to decide what the best and most strategic course of action is, with the goal of not over-reacting but appropriately reacting.” A financial services executive similarly noted, “We go through a decision-making thought process that really starts with ensuring that we have a good handle on the facts; then we determine what is in the interest of our company and the interests of our stakeholders. We try to be as transparent as possible.”

Respondents pointed to a new challenge due to President Trump and members of his administration citing inaccurate information on companies and individuals. “I always have the TV on and I hear Trump on suddenly talking about us,” said a top communicator from a motor vehicle company. “That’s fine as long as he’s accurate. If he would ever be inaccurate, for instance, say we are asking for something we’re not asking for, well, yes, then we would have to correct that.”

Nearly every communications executive noted the rise in false news is making their role in building and protecting the reputation of their brand increasingly more challenging – and even more important. One executive from a global manufacturing company pointed out this change, “I think the next five to 10 years in this field are going to be so different. What you’re seeing is the rise of a different type of communications person; it’s not PR and it’s not advertising. It’s going to be something that [embraces] the fairness doctrine and pushes back to a way of bringing facts into the light.”

A recent article published by the Institute for Public Relations cited an MIT research study that concluded falsehoods were 70 percent more likely to be retweeted than the truth. In response, Tina McCorkindale, Ph.D., APR, President and CEO of the Institute for Public Relations, offered some advice for PR professionals. “PR professionals must stop using the term ‘fake news’ as it is not used exclusively to define news that is not real. Rather, ‘false news’ is a more accurate term. PR professionals must be diligent in only sharing ‘true news’ by verifying sources as well as reading an article prior to sharing, rather than simply reading a headline. [And], PR professionals must be cognizant of the stories fed to the media in terms of their accuracy and authenticity (as we would expect of PR professionals).”

 **Massachusetts
Institute of
Technology**



of falsehoods were more likely to be retweeted than the truth

▲ ***“What you’re seeing is the rise of a different type of communications person; it’s not PR and it’s not advertising. It’s going to be something that [embraces] the fairness doctrine and pushes back to a way of bringing facts into the light.”***

Executive from a global manufacturing company

LEADING WITH PURPOSE

In addition to political topics, social issues were heavily discussed in interviews as organizations appeared to be more open to considering the implications at the behest of employees, customers, investors and communities. There are volumes of emerging research that clearly suggest employees, customers and other stakeholders want companies and their leaders to take a stand on certain issues. Even major institutional investors such as [BlackRock are advocating](#) for change. Despite this trend toward openness, there is wide variation among executives regarding their approach that can be charted on a continuum.

Across the board, our research found general agreement that the impact of social and cultural issues such as the #MeToo movement, gun control, LGBTQ rights and racial equality are influencing CMOs and CCOs in a significant way. And the rise of digital media has created a sense of urgency that all must be prepared to handle.

“It’s a new ball game and CCOs are better equipped, better prepared and better respected,” said one top communications consultant. “[CCOs] are driving these initiatives. At my firm, we say, ‘We treat your brand as a candidate,’ where you really need to understand vulnerabilities and strengths, and have a comprehensive view that incorporates a political mindset around things that have become cultural and institutional.”

On one end of the spectrum, some of the leaders we interviewed simply stated their companies will never take a public stand on controversial issues. Some brands do not want to get into policy debates because they work closely with the federal government. Others aren’t willing to take the calculated risk of alienating any faction of a target audience. And for others, their leadership simply doesn’t want to stick their neck out.

“Externally we’ve done very little or nothing in terms of picking up a public stand on any of the issues that have been brought into the limelight,” said the head of communications for a Human Resources organization. “That’s primarily because we have a very insular leadership group that doesn’t really like the limelight.”

Others have been willing to take a stand, at least internally, to inform employees of its leadership’s position. Issues such as anti-transgender bathroom bills and the immigration ban in 2017 were cited

multiple times as examples when companies developed communication plans for internal audiences, but refrained from speaking beyond that.

“When the legislature introduced a transgender bathroom bill, as a company we decided that we were not in favor,” said the top communications executive for a major airline. “We then let our employees know via an intranet that we had taken this position.”

On the other end of the spectrum, some executives discussed a willingness to take a public stand on certain issues if they were able to reinforce and live up to their organization’s core purpose, mission and values. A corporate purpose explains why a company exists beyond making money. What benefits does it bring to society? Once those values and/or purpose are defined, leadership teams leverage them as a framework to vet issues of the day and determine if it is appropriate and beneficial to take a stand.

“We did come up with a series of five or six positions that we would hold as a company and that we would advocate for as a company,” said an executive from a technology equipment firm. Similarly, another CCO noted, “You have to have principles that scale across all issues. In the past year, we fleshed them out further and made them explicit, and then shared them with all of our employees.”

In many of these cases, CMOs and CCOs are leading the discussion with their C-suite counterparts to push their organizations toward alignment of purpose, values and the messaging that underpins them. “They [C-suite] are certainly very interested in the financial results, but they definitely have an interest in the broader story and social impact on the company. We think it is increasingly important to communicate that,” said one head of communications from a technology firm.

This purpose-driven framework flows all the way down to individual channels, from executive thought leadership platforms to social media, events, earned media and beyond. “We continually lean into our beliefs and values,” said the head of communications at a consumer goods company, adding its CEO is in full support of a values-based approach. “We have a steady drumbeat of messages about our beliefs and values. When things happen, we all stand together and put one consistent message across all of our brand channels.”



CONCLUSION

While the majority of communicators and marketers are feeling more comfortable with uncertainty, those who are taking a purpose-led approach to planning are better poised to withstand a crisis and are more likely to take a stand when relevant issues capture the national conversation. Organizations that are taking steps to define (or refine) why their company exists have clear direction around what values they believe in and what customers, investors and other audiences they want to attract. With so many disruptions and distractions coming from every angle, companies can use their purpose to keep them focused. In doing so, organizations demonstrate strength, conviction and authenticity, which will appeal to those who believe in the same.

Companies are taking a more strategic approach when it comes to tackling societal issues. They are taking a pulse on how their employees and customers feel before publicly taking a stand on an issue. When issues such as immigration and anti-transgender bathroom bills moved

forward, organizations leveraged these circumstances as an opportunity to double down and reiterate their values. While they were aware they may receive pushback from stakeholders, they relied on their communication platforms, both internally and externally, to send a message.

“If you’re not decisive about where you stand, then both sides are going to leave,” said a top communications executive from a global manufacturer. “I’d rather take a moral and ethical stand and let one side of the portfolio walk. The fact of the matter is if somebody looks at us and says, ‘This company supports diversity and transgender rights. I don’t want to want work with that type of company,’ the conversation we have is, ‘Well, we don’t want them.’”

A Q&A WITH INTUIT

CCO ROB LANESEY

Peppercomm's Jackie Kolek interviewed Rob Lanesey, Senior Vice President and Chief Communications Officer for Intuit. Rob graciously agreed to go on the record with his experience navigating today's social, cultural and political climate. Intuit's principle-based approach was among the most sophisticated programs articulated in this research.



Jackie Kolek:

How do you view the current climate and how has it impacted your role?

Rob Lanesey:

The president has taken provocative positions and made provocative comments on social issues. Employees are now increasingly expecting companies to use their position to take a stand on those issues. And so we've been faced with that numerous times over the last year, where there's been something in the news, usually started by something that happened in the White House or elsewhere in the Beltway. And then we have to make the decision, 'Do we respond or not respond?'

Kolek:

Can you tell me about a specific incident?

Lanesey:

The very first incident we had to deal with was the immigration travel ban. That was the first one that sparked an acute need to have a point of view because we had employees who were affected. We ended up developing a set of core principles. We knew that the travel ban was going to be the first of many issues, and we couldn't handle it as a one-off; we had to create principles that would enable us to evaluate multiple incidents over time. And, as it turns out, that's proven to be quite true.

Kolek:

Tell me about the principles you have developed.

Lanesey:

We have six principles and we have broken them into the Three Whats and the Three Hows. The Three Whats are:

- ▲ *"We are steadfastly committed to our values and what we stand for as a company."*
- ▲ *"We respect the laws in the countries where we operate."*
- ▲ *"We stand for civil liberties, human rights and equal protection under the law for all citizens of every country."*

When one of these principles is challenged and it has the potential to affect our employees or the communities in which we operate, we will look to engage. And when we do, our How principles guide our actions.

The Three Hows are:

- ▲ *"We will use our position as a good corporate citizen to engage in and effect change."*
- ▲ *"We will decide the best method for how we will engage in order to get the outcome we want."*
- ▲ *"We will consider the impact on all of our four stakeholders (employees, customers, partners and shareholders) when we choose that method."*

Every time something comes up in the national conversation, we pull up the principles. I'll communicate with the CEO and we'll make a decision.

Kolek:

What other factors do you consider if/when to respond?

Lanesey:

The one dynamic that really can influence us, especially here in Silicon Valley, is the groundswell and the pressure from the community, the other companies who choose [to take a stand]. An issue will arise and a coalition of companies will start to speak publicly. We'll be asked to join them or employees will point to what other companies are doing and ask why aren't we doing the same. That added pressure weighs heavily on us as well, and it influenced our principles. We do not want to do something just because others are. Our principles remind us of that and keep us focused on the outcome we want to achieve first, then choosing the method of influence that best helps us achieve that second outcome.

WHICH EXECUTIVE ARE YOU?

This research uncovered a broad spectrum of executives in terms of their mindset and approach to this tumultuous world and their role as communicators.



THE RISK-AVERSE EXECUTIVE

Avoids speaking out on any controversial social topic that might alienate even a small percentage of stakeholders



THE CONSERVATIVE COMMUNICATOR

Shies away from controversial and/or political topics publicly

Considers speaking out on hot-button issues with employees



THE PRAGMATIC STUDENT

Seeks guidance from their peers, and based on best practices, creates their own tailored approach



THE C-SUITE COLLABORATOR

Actively engages with the C-suite and key employee groups

Creates alignment, strategy and action plans



THE MORALIST

Sees themselves as the keeper of the organization's purpose, values and principles

Willing to take a stand on issues that strike at the heart of the business



THE COURAGEOUS ADVOCATE

Actively and passionately speaks out on hot-button issues to reinforce the company's purpose, even if it means alienating key stakeholders

METHODOLOGY

Peppercomm and the Institute for Public Relations conducted in-depth telephone interviews with 25 senior marketing and communications executives at large enterprises between January and March of 2018. The intent of this research was to uncover the changing nature of participants' responsibilities and roles within their organization, in light of the social, cultural and political landscape in the United States. Interviewees were specifically asked about the impact of the current presidential administration.

Approximately half of the respondents had a C-level title; either Chief Communications Officer or Chief Marketing Officer. The remaining half of participants were marketing and/or communications department heads or vice presidents.

Research participants were drawn from a diverse set of both consumer and business-to-business industries, including automotive, financial services, healthcare, insurance, pharmaceuticals, technology and transportation.

All interview participants were assured confidentiality in order to elicit the most candid responses. Secondary sources also informed our insights and analysis; they are cited directly when relevant.