



# Joe Klein



**Strategic Research & Market Strategy Consultant | Founder | [KleinInsight.Com](https://KleinInsight.Com)**

Strategic research and insights consultant with 10+ years of experience leading high-impact initiatives across utilities, energy, and small business sectors. Known for translating complex behavior into strategy, building predictive modeling tools, and pioneering AI-enhanced workflows. Left a senior in-house role to launch Klein Insight, a consultancy focused on helping organizations make faster, smarter, and more human-centered decisions. Expert in translating complex data into clear, actionable insights that inform program design, marketing strategy, and stakeholder alignment. Proven ability to lead survey design, advanced analytics, user research, and cross-functional facilitation to drive measurable performance improvements and customer-centric growth.

**Auburn, CA | [KleinJoeS89@gmail.com](mailto:KleinJoeS89@gmail.com) | 831-247-7150 | [linkedin.com/in/KleinJoeS89](https://linkedin.com/in/KleinJoeS89)**

## ◆ **Work Experience:** Full Portfolio at [KleinInsight.Com](https://KleinInsight.Com)

### **Founder & Principal Consultant**

Klein Insight

*Jan 2025 - Present*

*Auburn, Ca*

Provide research-driven insight and strategy consulting for nonprofits and small businesses, supporting program development, audience targeting, and marketing execution through qualitative research, data analysis, and customer journey optimization.

- ◇ **Deliver full-cycle market research consulting**—including survey design, qualitative interviews, data analysis, and reporting—across the utility, nonprofit, and small business sectors.
- ◇ Lead **customer segmentation, persona development, and competitive analysis** to inform product, program, event, and outreach strategies.
- ◇ Build and implement **customer satisfaction surveys, program evaluations,** and communications testing frameworks to improve marketing and engagement efforts.
- ◇ Advise SMB clients on **marketing strategy, internal communications, and CX alignment** to strengthen organizational messaging and customer engagement.
- ◇ **Support local nonprofits and small business startups through** pro bono consulting focused on market research, audience targeting, and strategic outreach planning.
- ◇ **Develop print and digital marketing materials** (e.g., business cards, ads, newsletters, billboards) aligned with brand strategy and target audience insights to enhance visibility and engagement.
- ◇ Klein Insight has **supported 10+ client campaigns and outreach strategies**, helping organizations clarify messaging, refine audience segmentation, and improve engagement outcomes.

## Education

### **UC Davis**

B.A. in Managerial Economics

## **Skills & Focus Areas**

Research & Insights:

- ✓ Strategic Market Research & Consumer Insights
- ✓ Quantitative & Qualitative Data Analysis
- ✓ Predictive Modeling & Data Driven Forecasting
- ✓ Survey Design, UX Testing, & Research Methodologies
- ✓ Customer Segmentation & Behavioral Modeling

Strategy & Execution:

- ✓ Business Intelligence & Data Visualization
- ✓ Program Design, Development & Evaluation
- ✓ Stakeholder Engagement & Cross Functional Leadership
- ✓ Competitive Benchmarking & Trend Analysis

## Tech Stack:

### Research:

- ✓ Qualtrics
- ✓ SurveyMonkey
- ✓ Google Forms
- ✓ UserTesting.Com
- ✓ Alida
- ✓ NielsenIQ
- ✓ Forrester research
- ✓ Lexalytics
- ✓ QuestionPro

### Data Analysis:

- ✓ SPSS
- ✓ R
- ✓ SAS
- ✓ Excel (Advanced)
- ✓ PowerBI
- ✓ Tableau

### Collaboration:

- ✓ Teams
- ✓ SharePoint
- ✓ Miro
- ✓ Mural

### Marketing:

- ✓ Canva
- ✓ Adobe Illustrator
- ✓ Mailchimp

## Professional Experience (Continued)

### Sr. Market Research Specialist

SMUD (Sacramento Municipal Utility District)

*May 2014 – May 2025*

*Sacramento, Ca*

Led customer research and insight efforts across nearly every business unit—while continuously pushing to modernize outdated processes, adopt AI-driven methods, and drive faster, more actionable results in a historically rigid environment.

- ◇ Designed and proposed **cross-departmental customer journey initiatives** that challenged siloed structures and pushed toward a unified customer experience model.
- ◇ Pushed to **modernize legacy research practices** by piloting UX platforms, real-time intercepts, and continuous feedback loops, several of which met resistance or delays due to internal policy limitations.
- ◇ **Developed and maintained pricing models and forecasting tools** to assess the impact of rate changes, incentives, and managed charging programs—supporting data-driven decisions across residential and commercial clean energy offerings.
- ◇ **Pioneered early use of AI-powered tools** for survey analysis and creation to increase research speed and insight depth, despite organizational resistance.
- ◇ **Initiated and led development of a first-of-its-kind EV adoption modeling tool**, building a cross-functional team to design a dynamic predictive model using real-time inputs. The tool evaluated dozens of variables and projected adoption at the neighborhood level, rolling up into county-wide forecasts to support strategic planning.
- ◇ After years of pushing for more modern, insight-driven decision-making, I chose to leave and **build my own practice** to apply what I had learned without systemic constraints.

**Request a brand review by phone or email.**