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Using Analyst Premium Content to Supercharge Your AR Program

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AGENDA

1. Introduction
2. Analyst Premium Content Overview
3. Using Analyst Premium Content
4. Important Considerations & Advice
5. Questions & Answers

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SECTION 1

Introduction

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INTRODUCTION

About Me

Professional:

- Currently Sr. Director, Analyst Relations at Alteryx
- Alteryx is a $750MM public company, provider of analytics automation software
- Joined Alteryx in April 2021 after six years at Oracle AR, and 7.5 years at HP AR
- First began AR career ~1994; first full-time AR job (Intel) in 1997
- ARchitect user since 2008

Personal:

- Based in Annapolis, Maryland (though a Seattle native!)
- 25+ year Mercedes-Benz car collector & mechanic
- Avid Chesapeake Bay boater

SECTION 2

Analyst Premium Content Overview

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Adrift in a Sea of Analyst Data

What is Analyst Premium Content?

- Comprehensive database of analyst-authored information
  - Syndicated research
  - Blog posts
  - Media quotes
  - Tweets
- Searchable and trackable information source
- Optional add-on to base ARchitect capabilities

32,500+

The number of RSS-syndicated blog posts from all analysts posted year-to-date in 2022

What Does Analyst Premium Content Do?

- Provides a flexible information resource of relevant and up-to-date information
- Offers a comprehensive snapshot of what analysts are thinking and publicly saying
- Provides an information “source of record” with multiple uses
- Augments “live” analyst interactions with hard data on outcomes

“ OK, but what does Analyst Premium Content ***REALLY*** do?

It provides an automated, easy, and timely way to stay on top of what your key analysts are saying, and what your competitors are doing.

SECTION 3

Using Analyst Premium Content

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AR Use Cases for Analyst Premium Content

- Timely Analyst Alerts
- Competitive Tracking
- Analyst “Trend Spotting”
- Quarterly AR Measurement

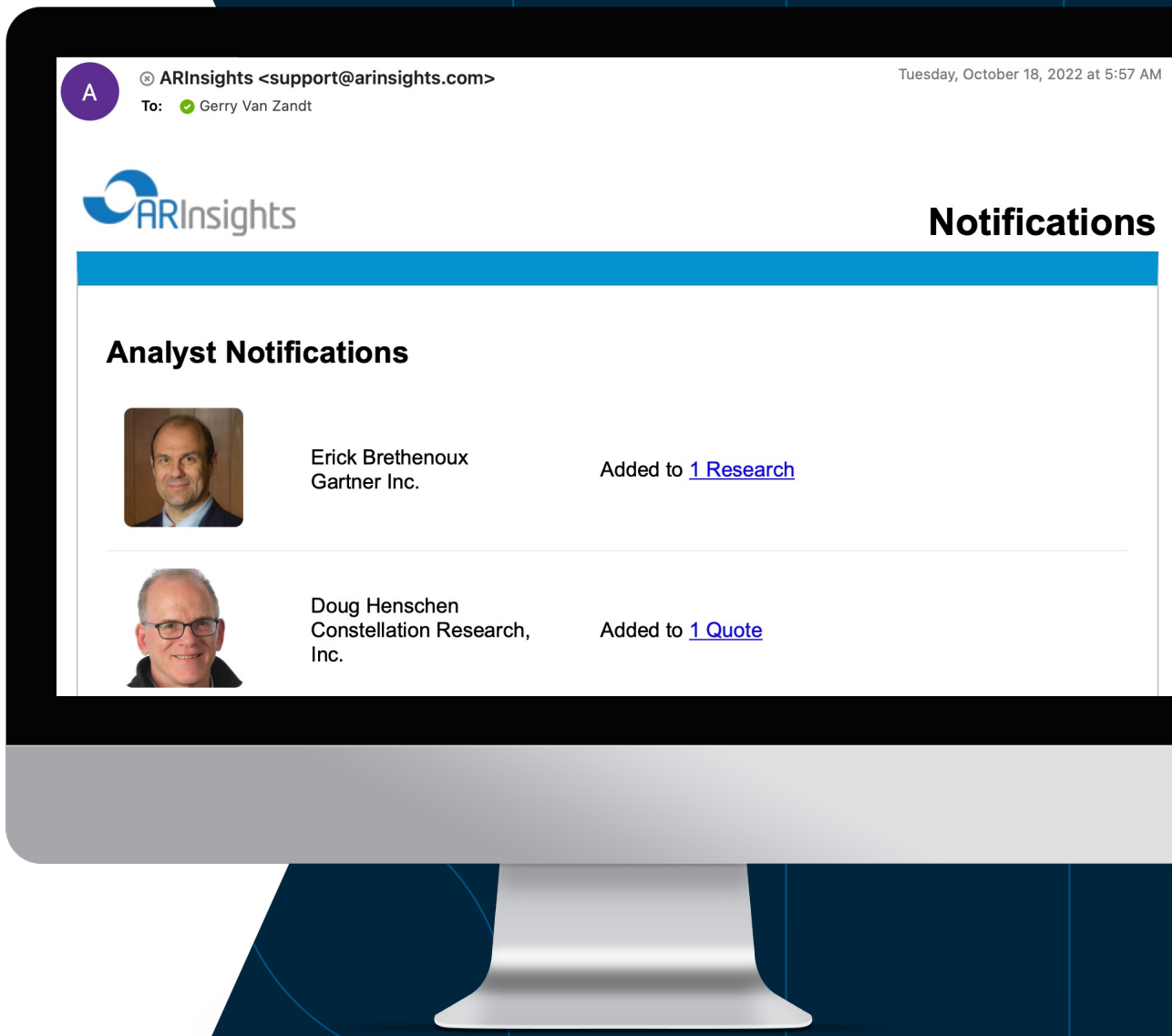
136,000+

Tweets authored by all analysts from the three largest firms YTD in 2022

USE CASE 1

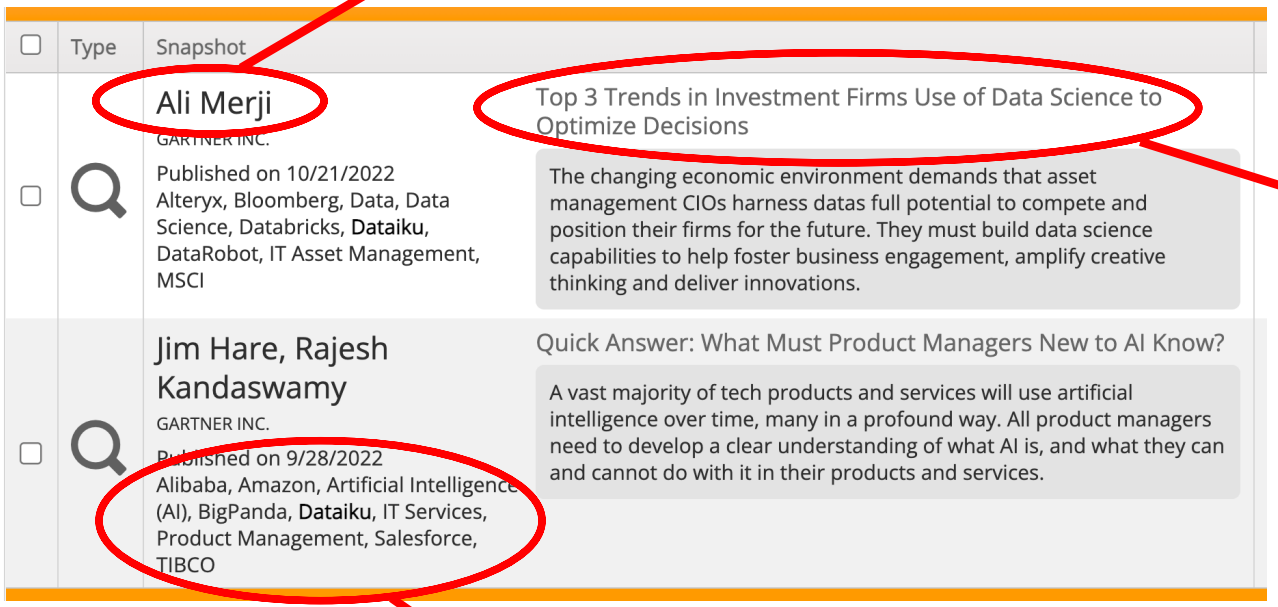
Using Alerts for Action

- Use Analyst Premium Content (APC) as a daily “rollup” for AR action
  - APC augments (and often beats) automated alerts from the firms
- Flag content for follow-up
  - ASAP, Priority, or FYI
- Engage with individual analysts as needed
  - Inquiry, social media, or e-mail



Use Analyst Premium Content to Drive Actions

New analyst we haven't spoken with before. Do research and set up introductory inquiry.



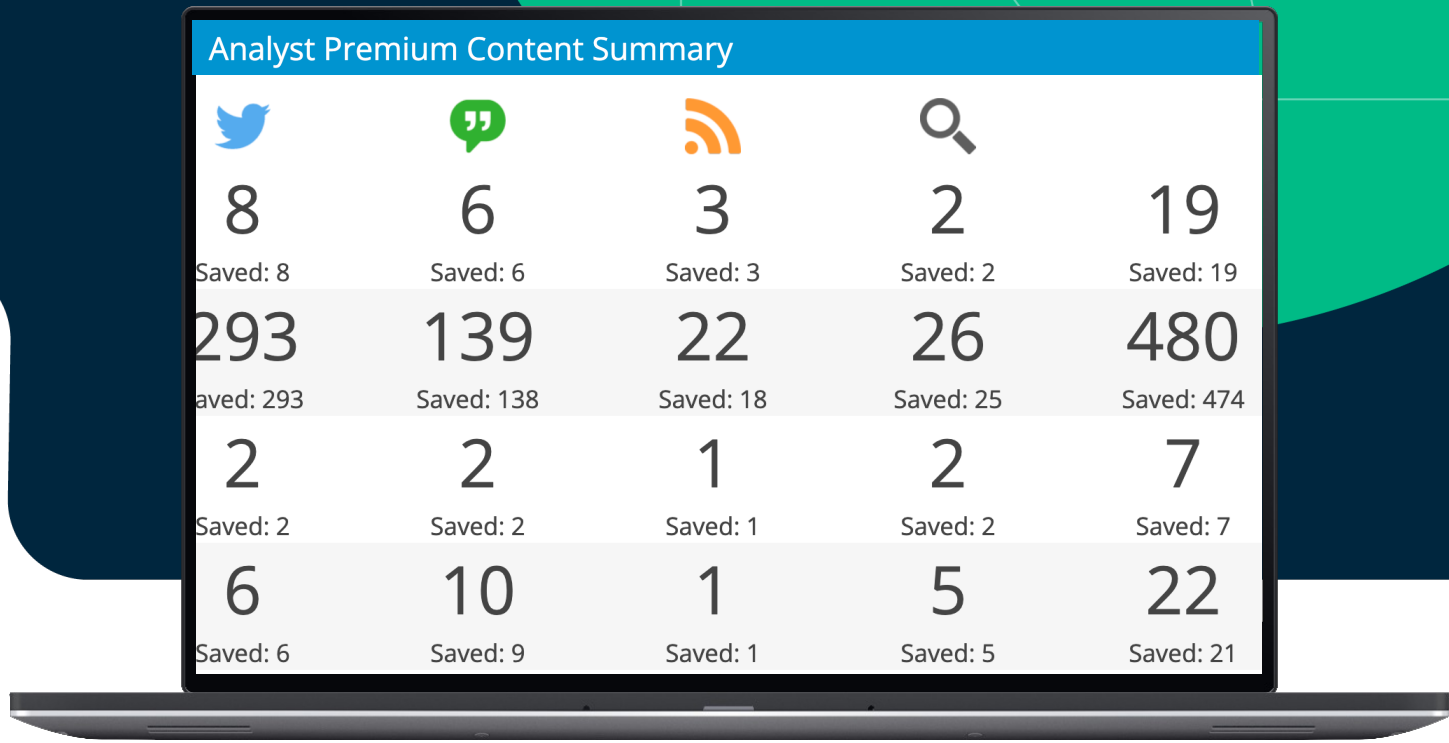
Topic ties in with key company themes. Flag this report to other seatholders and execs to use relevant assumptions and stats.

Possible inquiry to determine why competitor was included here and not my firm.

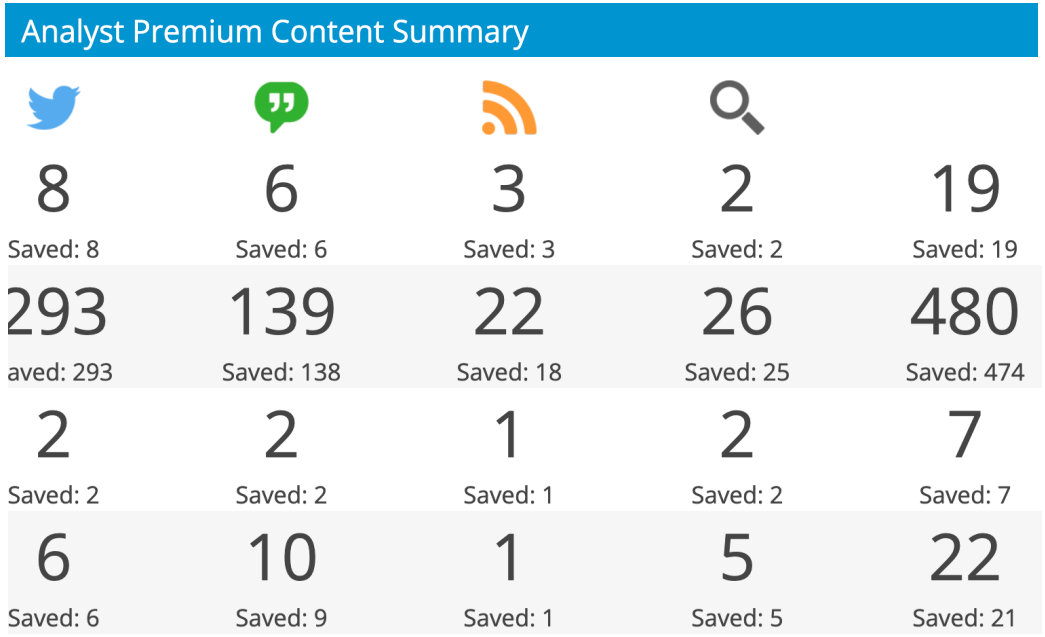
USE CASE 2

Keep Tabs on Competitors

- Review Analyst Premium Content dashboard every week
- Click through on categories to view summaries
- Identify and note items of interest
- Perform further analysis on “blips” or “dips” to determine root cause



Typical “Quick” Weekly Competitive Analysis



Syndicated Research

- My firm appeared in two reports in the past month
- Competitors B and C appeared in two and five reports; Competitor A (mega-vendor) appeared in 26 reports – but most of them were not core areas

Analyst Media Quotes

- Analysts were quoted about my firm in six media articles during the past month
- Competitor C featured in 10 media quotes, due to a major product announcement

Activity Totals

- Overall, my firm’s activity total across all Premium Content looks appropriate month-to-date

COMPETITIVE TRACKING

Alert-Driven Action Workflow

8:00 AM

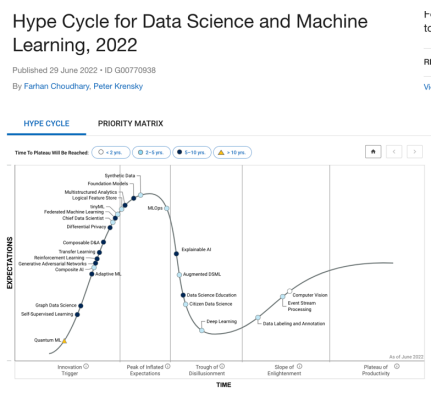
WEEKLY REVIEW AND DRILL DOWN ON COMPETITORS

Analyst Premium Content Summary

8	6	3	2	19
Saved: 8	Saved: 6	Saved: 3	Saved: 2	Saved: 19
293	139	22	26	480
aved: 293	Saved: 138	Saved: 18	Saved: 25	Saved: 474
2	2	1	2	7
Saved: 2	Saved: 2	Saved: 1	Saved: 2	Saved: 7
6	10	1	5	22
Saved: 6	Saved: 9	Saved: 1	Saved: 5	Saved: 21

8:05 AM

SKIM REPORT AND SEE COMPETITOR MENTIONED IN NEW MARKET SPACE



1:00 PM

FLAG COMP INTEL & PM LEADS AND DO FURTHER RESEARCH

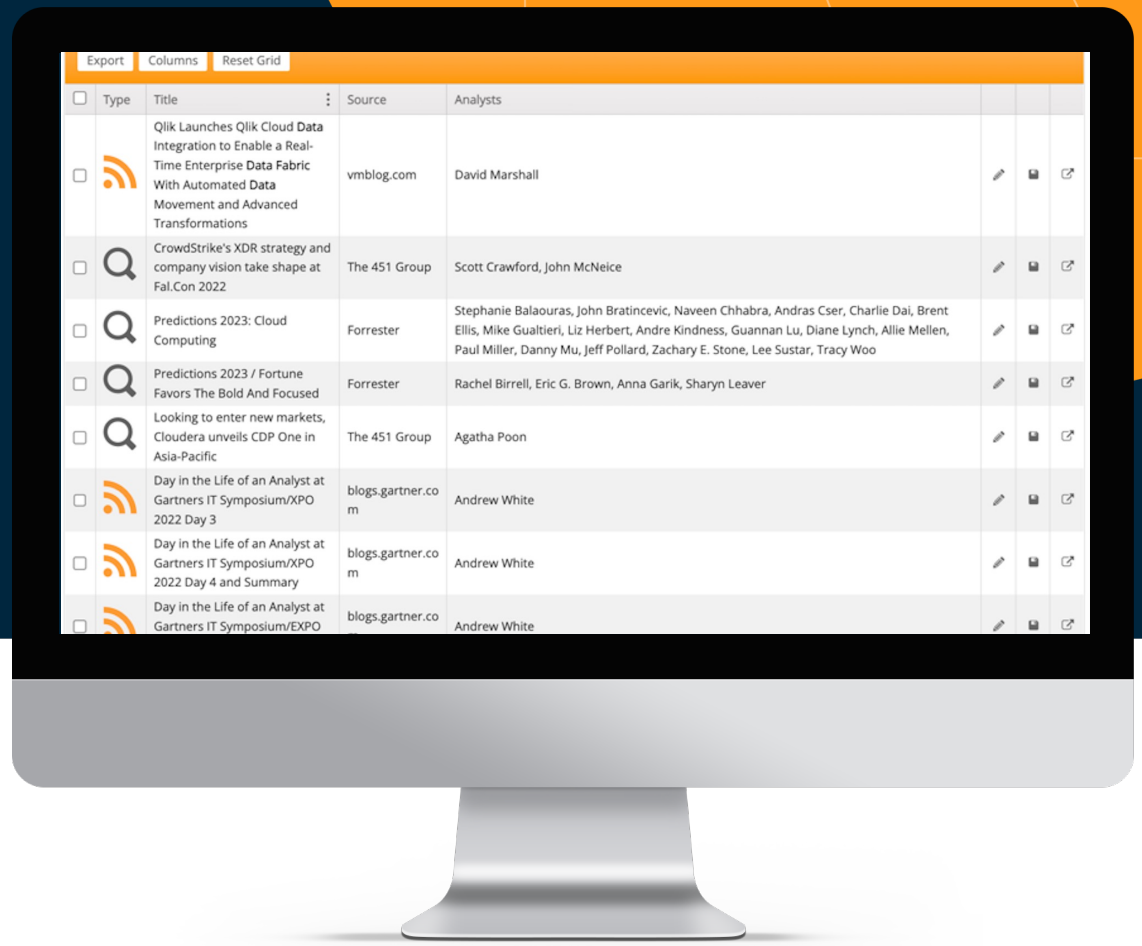
ONE WEEK LATER

CONDUCT INQUIRY TO DISCUSS COMPETITOR CAPABILITIES

USE CASE 3

Leveraging Premium Content to Streamline Information Gathering

- Analyst Premium Content helps you quickly compile analyst research on specific topics
- Use the “Search” function to define parameters and conduct a topical search
- Apply filters to refine and identify relevant firms, analysts, and research



ANALYST TREND-SPOTTING

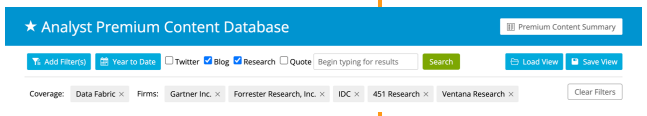
Scenario: Researching a New Product Market

1

Product exec asks you to get analysts' opinion on the nebulous topic of "data fabrics"

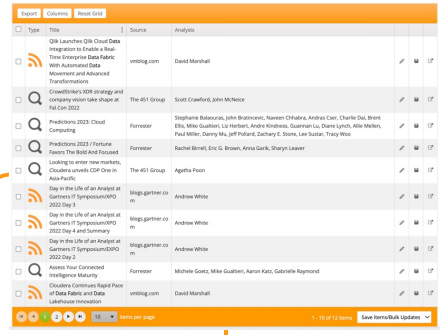
2

You set up an Analyst Premium Content search for "data fabric" with top 5 firms



3

Search results in 34 relevant analyst reports and blog posts

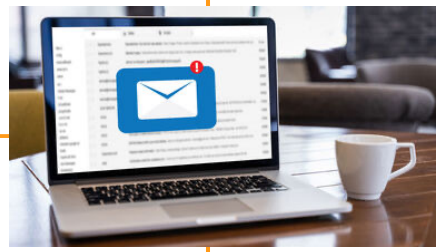


4

You click through results and settle on 12 reports and blog posts that meet the request

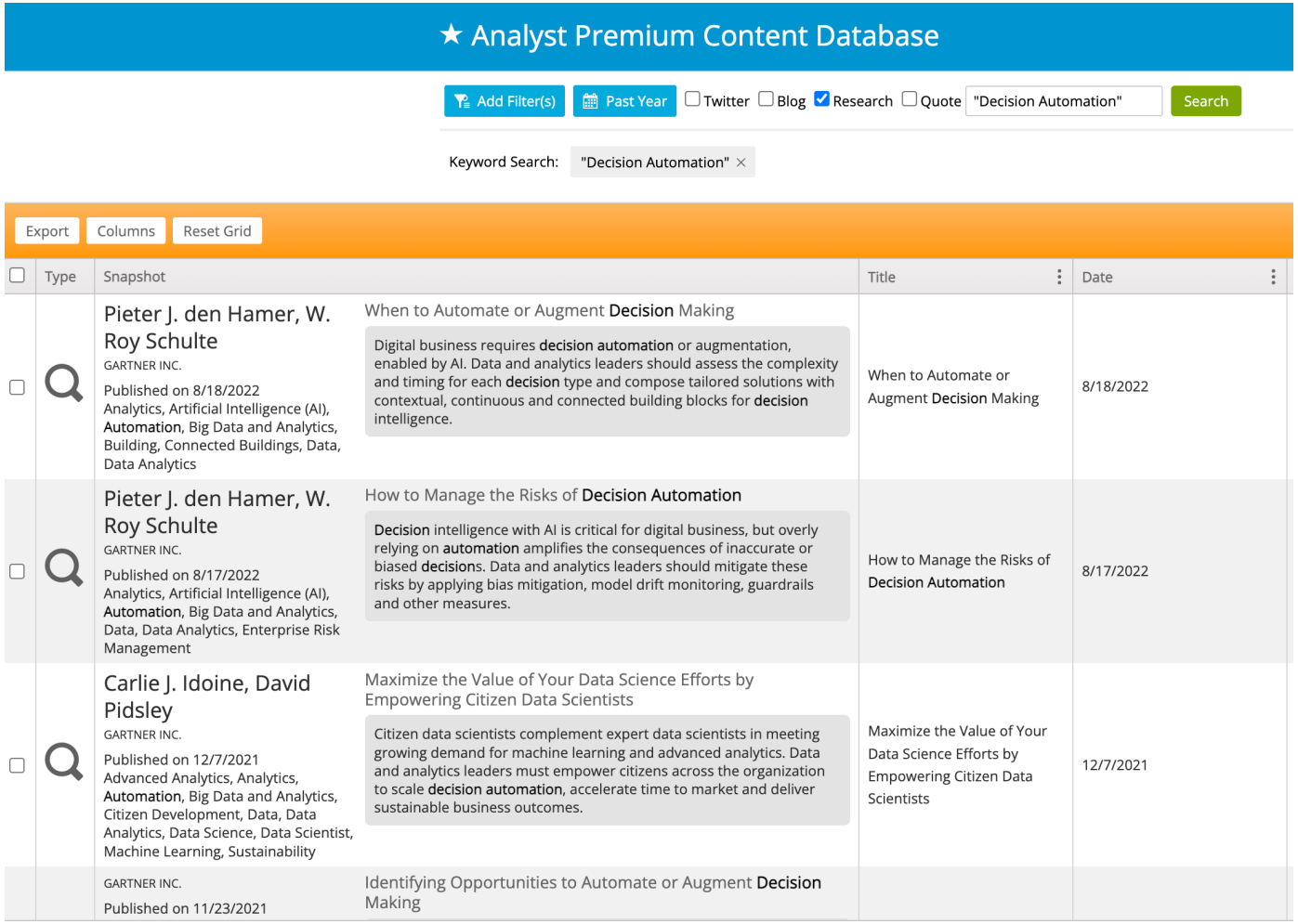
5

Email relevant reports back to your product exec with brief summary and commentary



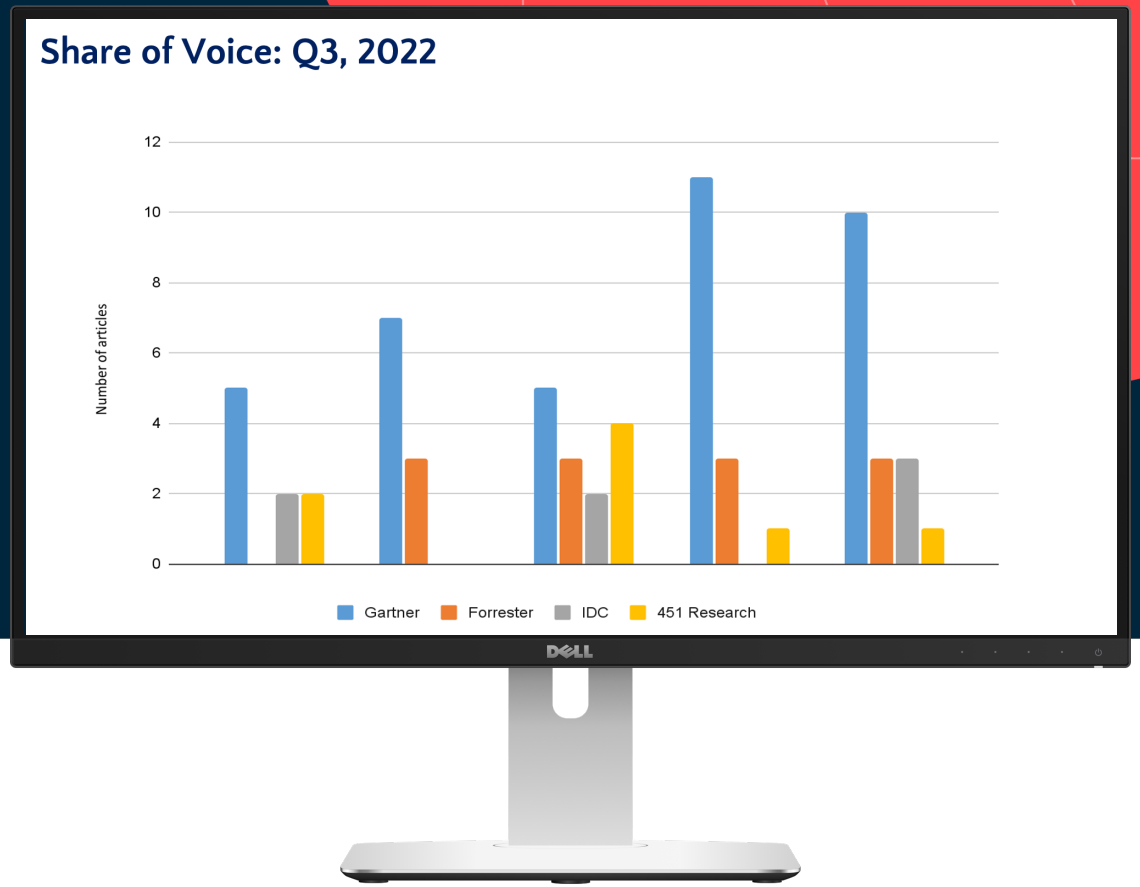
Scenario: Identifying Emerging Product/Tech Trends

1. You spot a technology concept that you have never seen before that looks relevant to your company
   - Example: “Decision Automation”
2. Instead of going to each analyst firm’s web site, perform a search of all analyst content using Analyst Premium Content
3. Analyze your results to see if the topic merits further investigation
4. Follow up as appropriate internally and with analysts



USE CASE 4

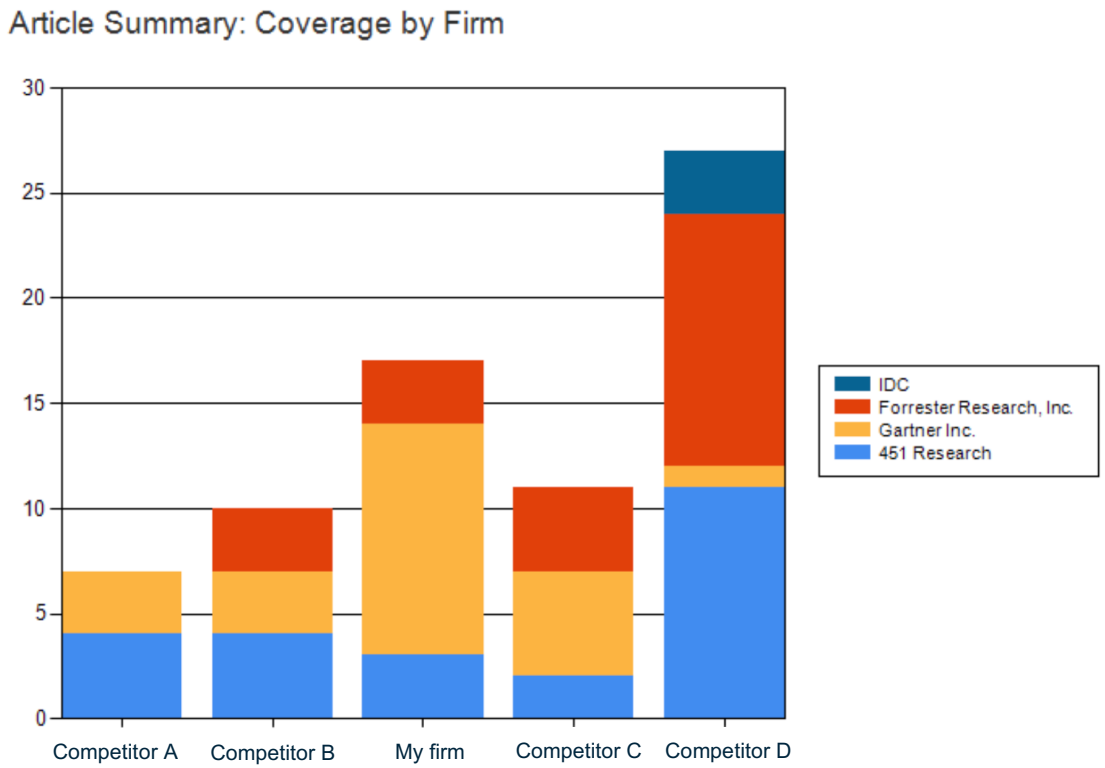
Measure Your AR Program's Results



- Use saved and flagged content for analysis in quarterly AR metrics
- Do a manual review to ensure content is relevant & eligible
- Combine with ARchitect operational data
- Create custom or use off-the-shelf measurement reports to generate results

POWERING AR METRICS REPORTS

- Analyst Premium Content provides the base content pool for AR measurement
- Content can be measured for Share of Voice, Sentiment, and Report Trending
- ARchitect also allows you to create fully custom metrics reports based on your parameters, or use pre-fab reports
  - Analyst firms, analysts, time periods, competitors, content types



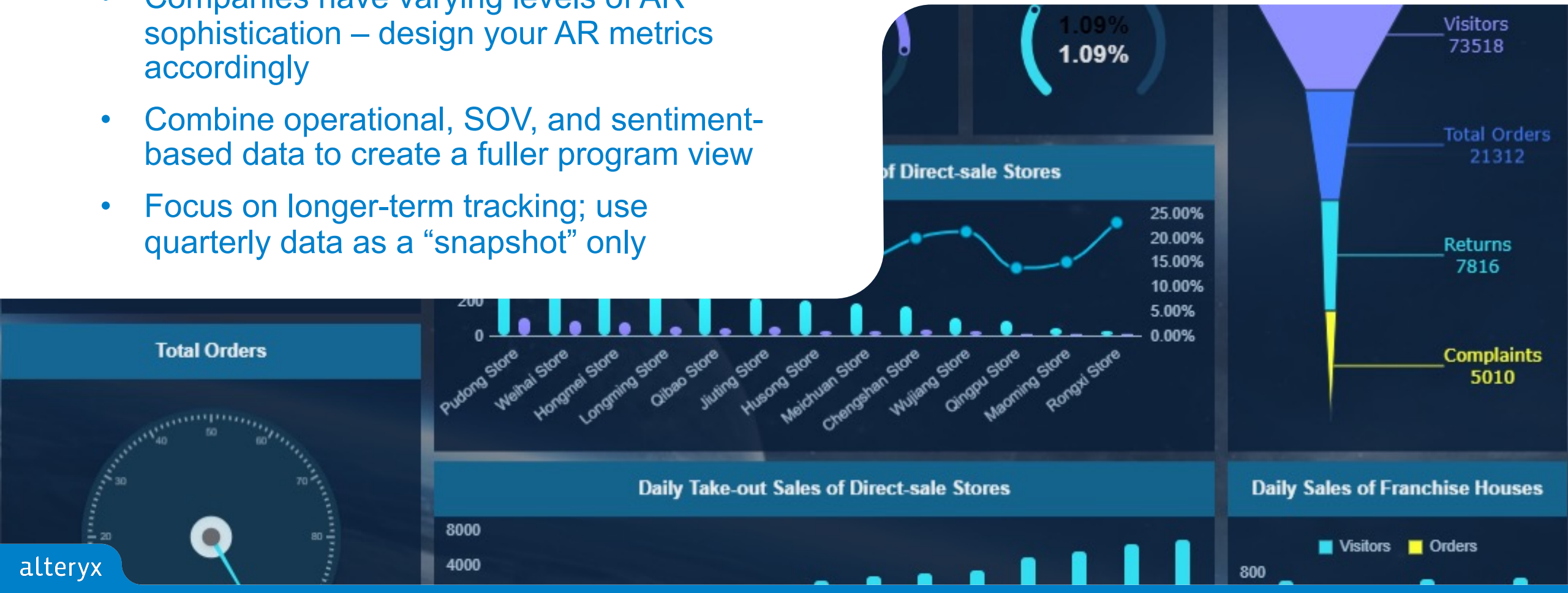
Sample Quarterly SOV Graph

QUARTERLY AR MEASUREMENT

Tips and Ideas for AR Measurement

- Companies have varying levels of AR sophistication – design your AR metrics accordingly
- Combine operational, SOV, and sentiment-based data to create a fuller program view
- Focus on longer-term tracking; use quarterly data as a “snapshot” only

- **TIP:** Save custom reports you create for future use
- **TIP:** Double-check report results & sentiment



SECTION 4

Important Considerations and Advice

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CONSIDERATIONS & ADVICE

“Know Before You Go!”

- Determine your program’s objectives & scope up front
- Decide, based on your program’s objectives, how Analyst Premium Content can support them
- Know APC’s benefits and limitations, and make decisions accordingly
- Carefully and thoughtfully create searches and parameters
- Start small and get to know APC, then expand

CONSIDERATIONS & ADVICE

Know Your Program's Key Parameters

Carefully consider the following elements as you set up Analyst Premium Content:

- Know the analysts you want to monitor (don't boil the ocean!)
- Determine your topic areas (based on your focus areas)
- Track your major competitors (top 4-5 is a good place to start)
- Select media types to monitor (the social media question)

CONSIDERATIONS & ADVICE

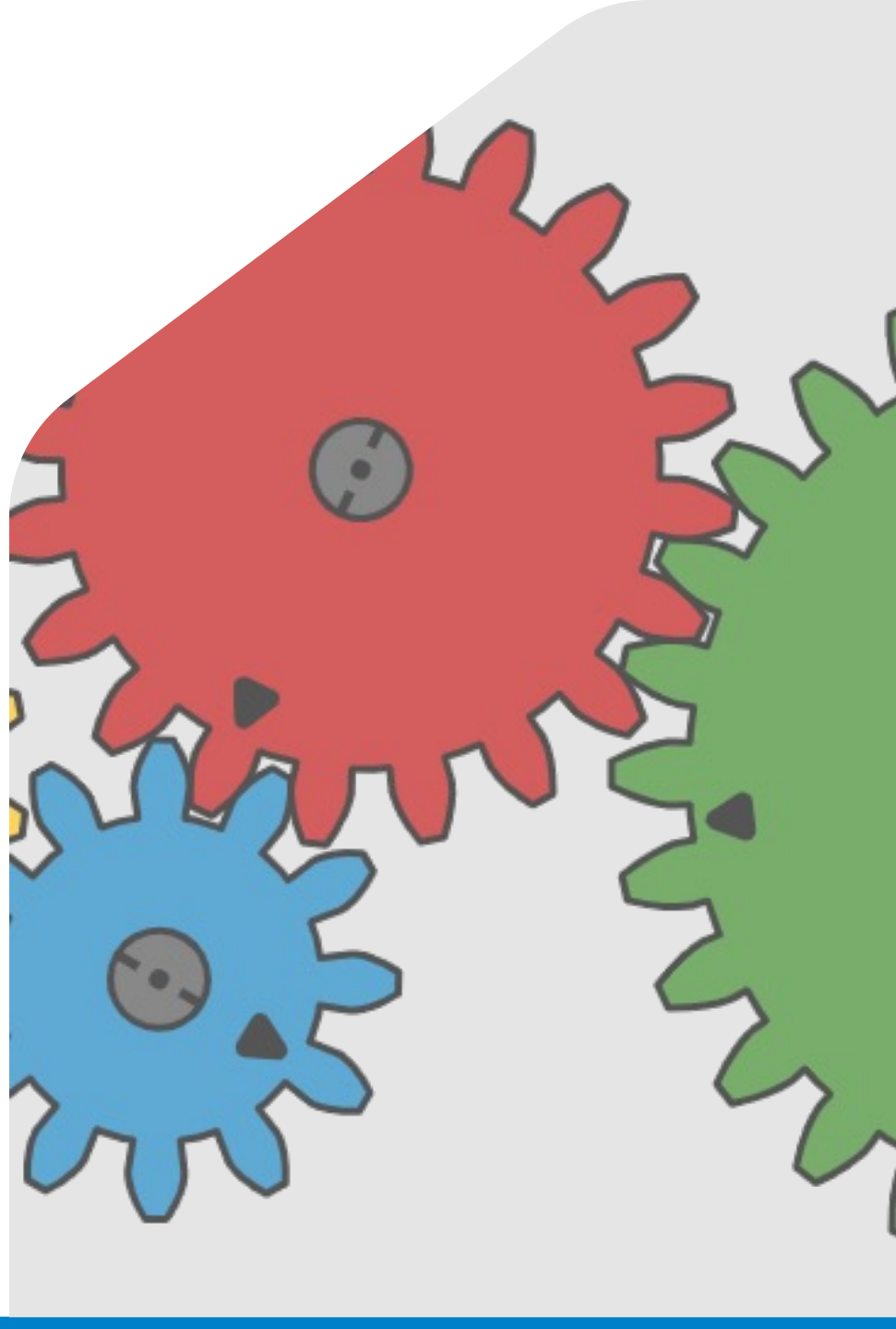
“Never Assume!”

- Don’t use Analyst Premium Content as your sole source of information
- Augment APC with searches of analyst web sites, particularly for important results
- Double-check results & adjust if needed

CONSIDERATIONS & ADVICE

Use ARInsights to Refine and Expand

- Work with ARInsights to test-drive Analyst Premium Content
- Get a guided tour from an ARInsights expert
- Watch their educational videos
- Use ARInsights as a resource to help create relevant searches, reports and alerts based on your needs and feedback



SECTION 5

Questions & Answers

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Thank You!