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Using Analyst Premium Content to Supercharge Your AR Program

Gerry Van Zandt

Senior Director, Analyst Relations

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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



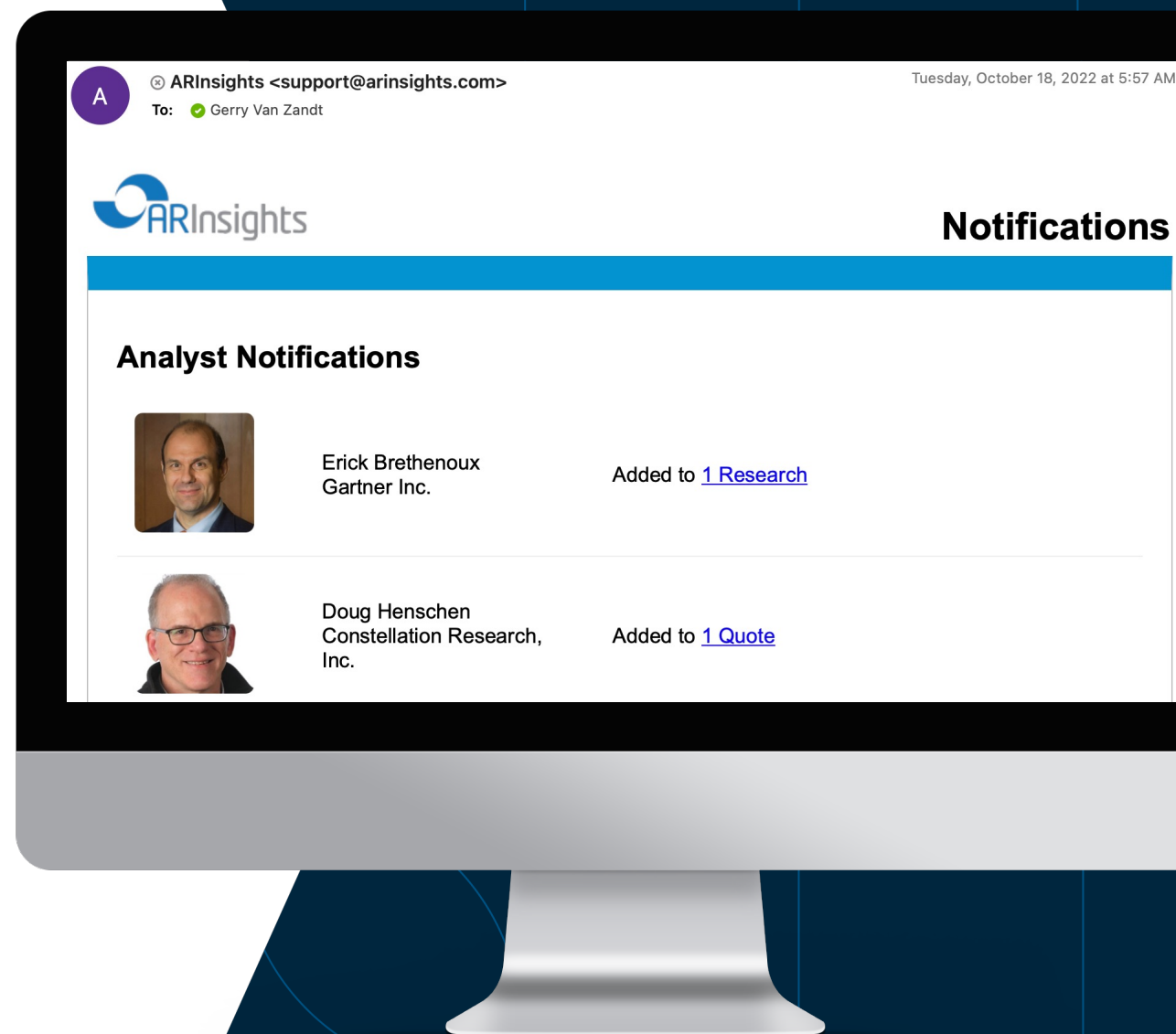
136,000+

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.

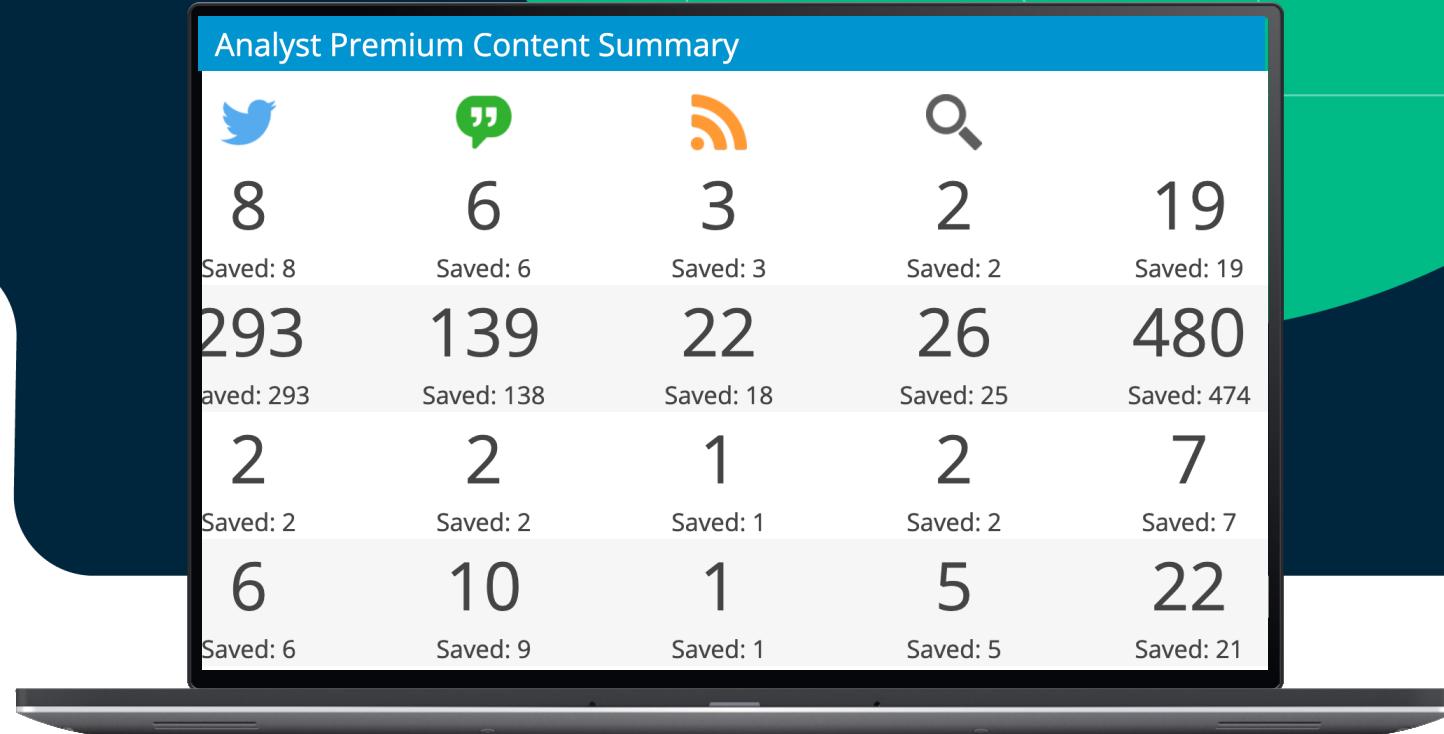
<input type="checkbox"/>	Type	Snapshot
<input type="checkbox"/>		<p>Ali Merji GARTNER INC.</p> <p>Published on 10/21/2022 Alteryx, Bloomberg, Data, Data Science, Databricks, Dataiku, DataRobot, IT Asset Management, MSCI</p> <p>Top 3 Trends in Investment Firms Use of Data Science to Optimize Decisions</p> <p>The changing economic environment demands that asset management CIOs harness data's full potential to compete and position their firms for the future. They must build data science capabilities to help foster business engagement, amplify creative thinking and deliver innovations.</p>
<input type="checkbox"/>		<p>Jim Hare, Rajesh Kandaswamy GARTNER INC.</p> <p>Published on 9/28/2022 Alibaba, Amazon, Artificial Intelligence (AI), BigPanda, Dataiku, IT Services, Product Management, Salesforce, TIBCO</p> <p>Quick Answer: What Must Product Managers New to AI Know?</p> <p>A vast majority of tech products and services will use artificial intelligence over time, many in a profound way. All product managers need to develop a clear understanding of what AI is, and what they can and cannot do with it in their products and services.</p>

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.

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

	Analyst Premium Content Summary				
					
My Company	8 <small>Saved: 8</small>	6 <small>Saved: 6</small>	3 <small>Saved: 3</small>	2 <small>Saved: 2</small>	19 <small>Saved: 19</small>
Competitor A	293 <small>Saved: 293</small>	139 <small>Saved: 138</small>	22 <small>Saved: 18</small>	26 <small>Saved: 25</small>	480 <small>Saved: 474</small>
Competitor B	2 <small>Saved: 2</small>	2 <small>Saved: 2</small>	1 <small>Saved: 1</small>	2 <small>Saved: 2</small>	7 <small>Saved: 7</small>
Competitor C	6 <small>Saved: 6</small>	10 <small>Saved: 9</small>	1 <small>Saved: 1</small>	5 <small>Saved: 5</small>	22 <small>Saved: 21</small>

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

ONE WEEK LATER
CONDUCT INQUIRY TO
DISCUSS COMPETITOR
CAPABILITIES

8:00 AM
WEEKLY REVIEW
AND DRILL DOWN ON
COMPETITORS

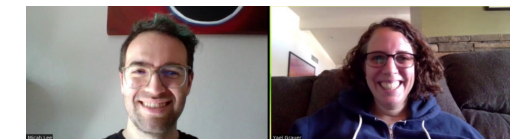
8:05 AM
SKIM REPORT AND SEE
COMPETITOR
MENTIONED IN NEW
MARKET SPACE

1:00 PM
FLAG COMP INTEL & PM
LEADS AND DO FURTHER
RESEARCH

Analyst Premium Content Summary

Twitter	WhatsApp	RSS	Search	Total
8	6	3	2	19
Saved: 8	Saved: 6	Saved: 3	Saved: 2	Saved: 19
293	139	22	26	480
Saved: 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

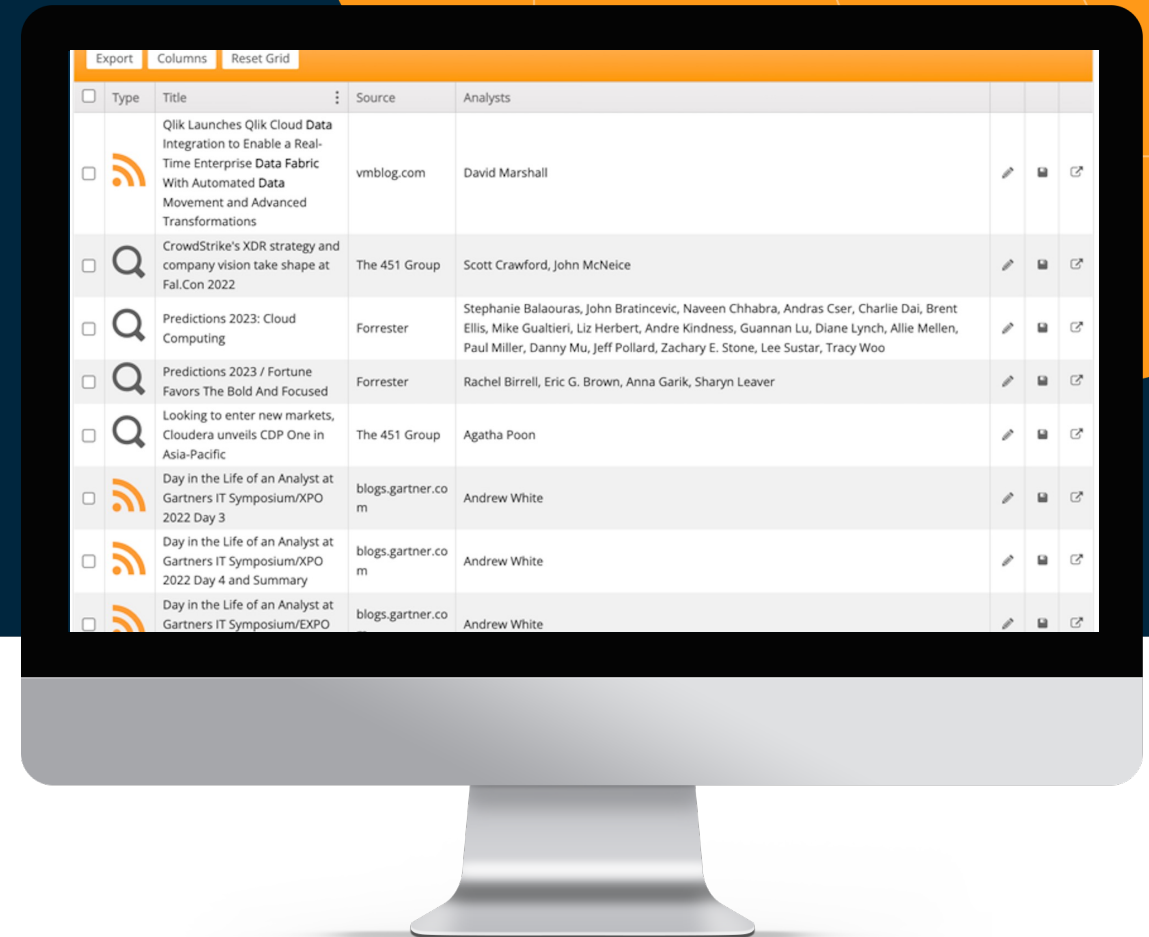
Hype Cycle for Data Science and Machine Learning, 2022
Published 29 June 2022 • ID: G00770938
By Farhan Choudhary, Peter Krensky



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



Scenario: Researching a New Product Market

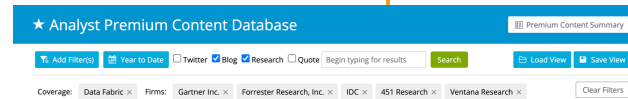
1

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

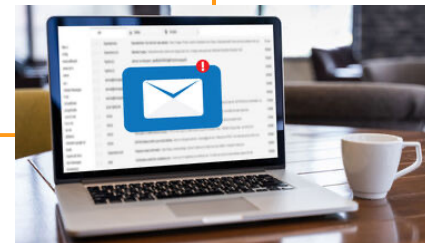
Type	Title	Source	Analysts
Report	Qlik Launches Qlik Cloud Data Integration to Enable a Real-Time Enterprise Data Fabric With Automated Data Movement and Advanced Transformations	enabling.com	David Marshall
Report	Cloudwatch's 2023 Spring and company vision take shape at AWS re:Invent	The 451 Group	Scott Crawford, John McKeown
Report	Forrester's 2023 Future of Data Fabric Report	Forrester	Stephanie Balanovic, John Buttrick, Naren Chhabra, Andrew Carr, Charlie Dai, Brent Ellis, Mike Guadelli, Lu Heng, Anshu Kulkarni, Guarnieri, Steve Lytle, Mike Wallin, Paul Miller, Danny Ma, Jeff Pollard, Kishan E. Sreen, Leo Suster, Tracy Wu
Report	Forrester's 2023 Future of Data Fabric Report: Looking to enter new markets, Cloudwatch unveils Qlik One as a new platform	Forrester	Rachel Birrell, Eric G. Brown, Anna Corke, Sharyn Leaver
Report	Day in the Life of an Analyst at Gartner: 17 SponsorshipQ 2022 Day 3	The 451 Group	Agatha Poon
Report	Day in the Life of an Analyst at Gartner: 17 SponsorshipQ 2022 Day 4 and Summary	enabling.com	Andrew White
Report	Day in the Life of an Analyst at Gartner: 17 SponsorshipQ 2022 Day 2	enabling.com	Andrew White
Report	Day in the Life of an Analyst at Gartner: 17 SponsorshipQ 2022 Day 1	enabling.com	Andrew White
Report	How's Your Connected Intelligence Maturity?	Forrester	Michelle Court, Mike Guadelli, Aaron Katz, Gabrielle Raymond
Report	Cloudwatch's 2023 Spring and company vision take shape at AWS re:Invent	enabling.com	David Marshall

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

★ Analyst Premium Content Database

🔼 Add Filter(s) 📅 Past Year Twitter Blog Research Quote Search

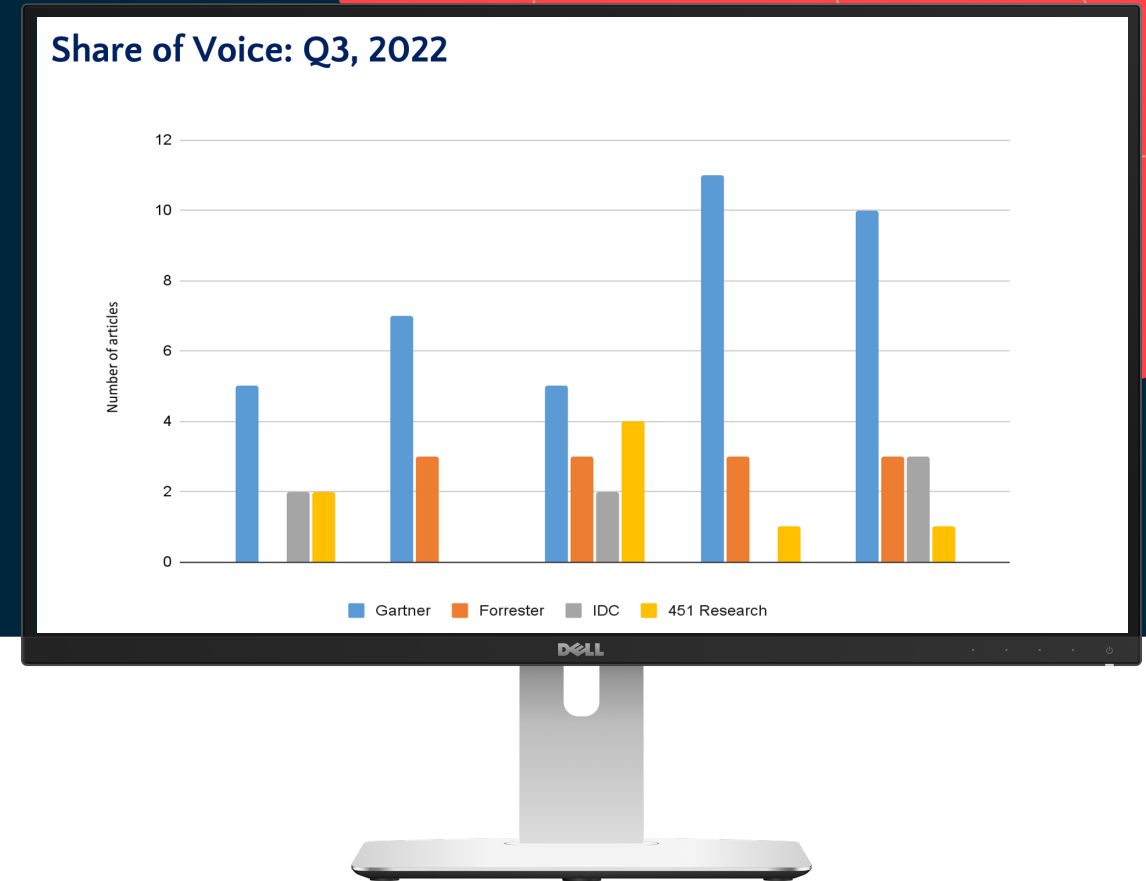
Keyword Search: "Decision Automation" ×

Export Columns Reset Grid

<input type="checkbox"/>	Type	Snapshot	Title	Date
<input type="checkbox"/>	Q	<p>Pieter J. den Hamer, W. Roy Schulte GARTNER INC.</p> <p>Published on 8/18/2022 Analytics, Artificial Intelligence (AI), Automation, Big Data and Analytics, Building, Connected Buildings, Data, Data Analytics</p>	<p>When to Automate or Augment Decision Making</p> <p>Digital business requires decision automation or augmentation, enabled by AI. Data and analytics leaders should assess the complexity and timing for each decision type and compose tailored solutions with contextual, continuous and connected building blocks for decision intelligence.</p>	<p>When to Automate or Augment Decision Making</p> <p>8/18/2022</p>
<input type="checkbox"/>	Q	<p>Pieter J. den Hamer, W. Roy Schulte GARTNER INC.</p> <p>Published on 8/17/2022 Analytics, Artificial Intelligence (AI), Automation, Big Data and Analytics, Data, Data Analytics, Enterprise Risk Management</p>	<p>How to Manage the Risks of Decision Automation</p> <p>Decision intelligence with AI is critical for digital business, but overly relying on automation amplifies the consequences of inaccurate or biased decisions. Data and analytics leaders should mitigate these risks by applying bias mitigation, model drift monitoring, guardrails and other measures.</p>	<p>How to Manage the Risks of Decision Automation</p> <p>8/17/2022</p>
<input type="checkbox"/>	Q	<p>Carlie J. Idoine, David Pidsley GARTNER INC.</p> <p>Published on 12/7/2021 Advanced Analytics, Analytics, Automation, Big Data and Analytics, Citizen Development, Data, Data Analytics, Data Science, Data Scientist, Machine Learning, Sustainability</p>	<p>Maximize the Value of Your Data Science Efforts by Empowering Citizen Data Scientists</p> <p>Citizen data scientists complement expert data scientists in meeting growing demand for machine learning and advanced analytics. Data and analytics leaders must empower citizens across the organization to scale decision automation, accelerate time to market and deliver sustainable business outcomes.</p>	<p>Maximize the Value of Your Data Science Efforts by Empowering Citizen Data Scientists</p> <p>12/7/2021</p>
		<p>GARTNER INC. Published on 11/23/2021</p>	<p>Identifying Opportunities to Automate or Augment Decision Making</p>	

Measure Your AR Program's Results

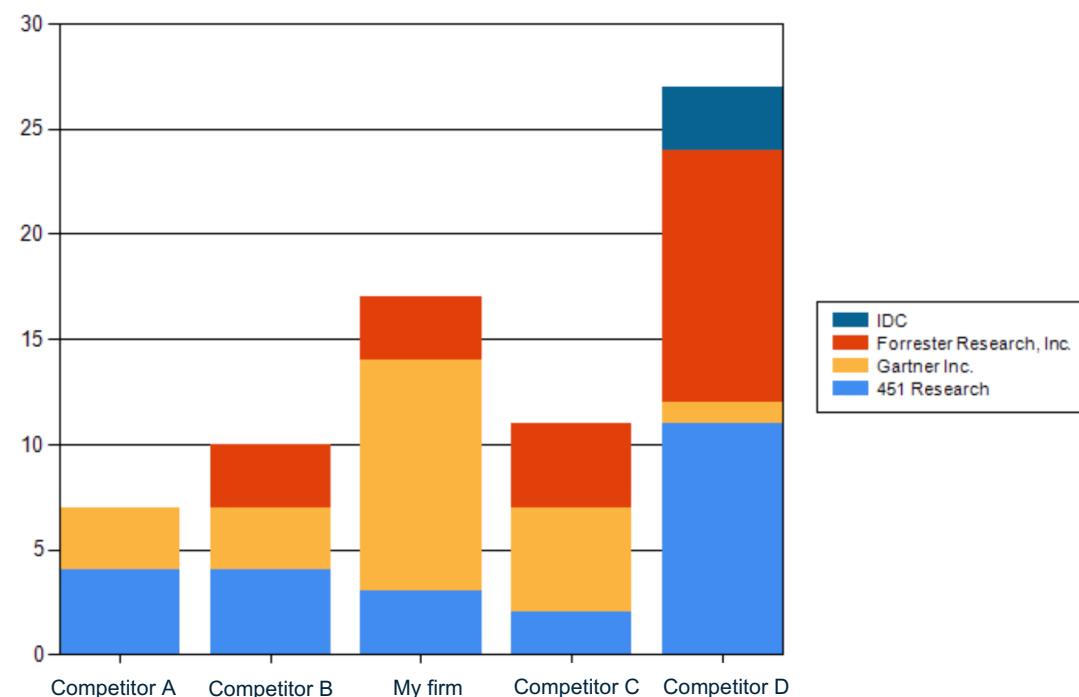
- Use saved and flagged content for analysis in quarterly AR metrics
- Do a manual review to ensure content is relevant & eligible
- Combine with ARchitect operational data
- Create custom or use off-the-shelf measurement reports to generate results



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

Article Summary: Coverage by Firm

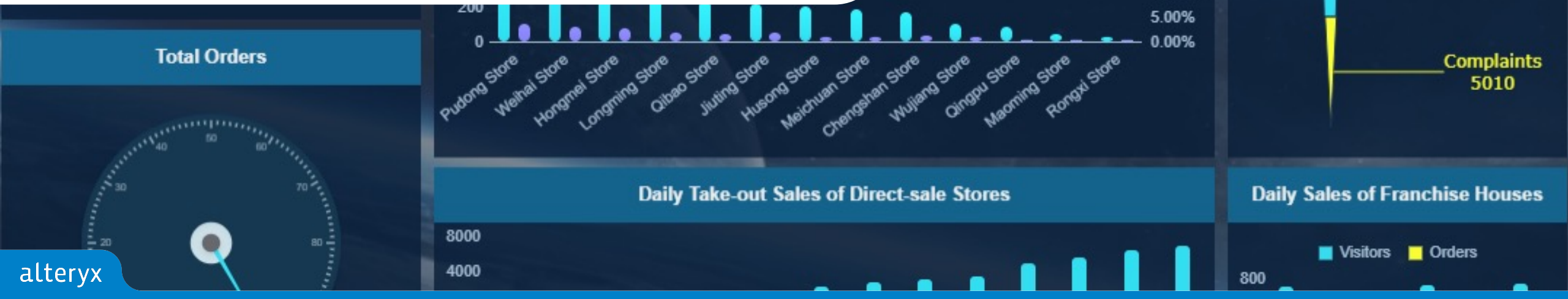


Sample Quarterly SOV Graph

Tips and Ideas for AR Measurement

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

- 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



SECTION 4

Important Considerations and Advice

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“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



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)

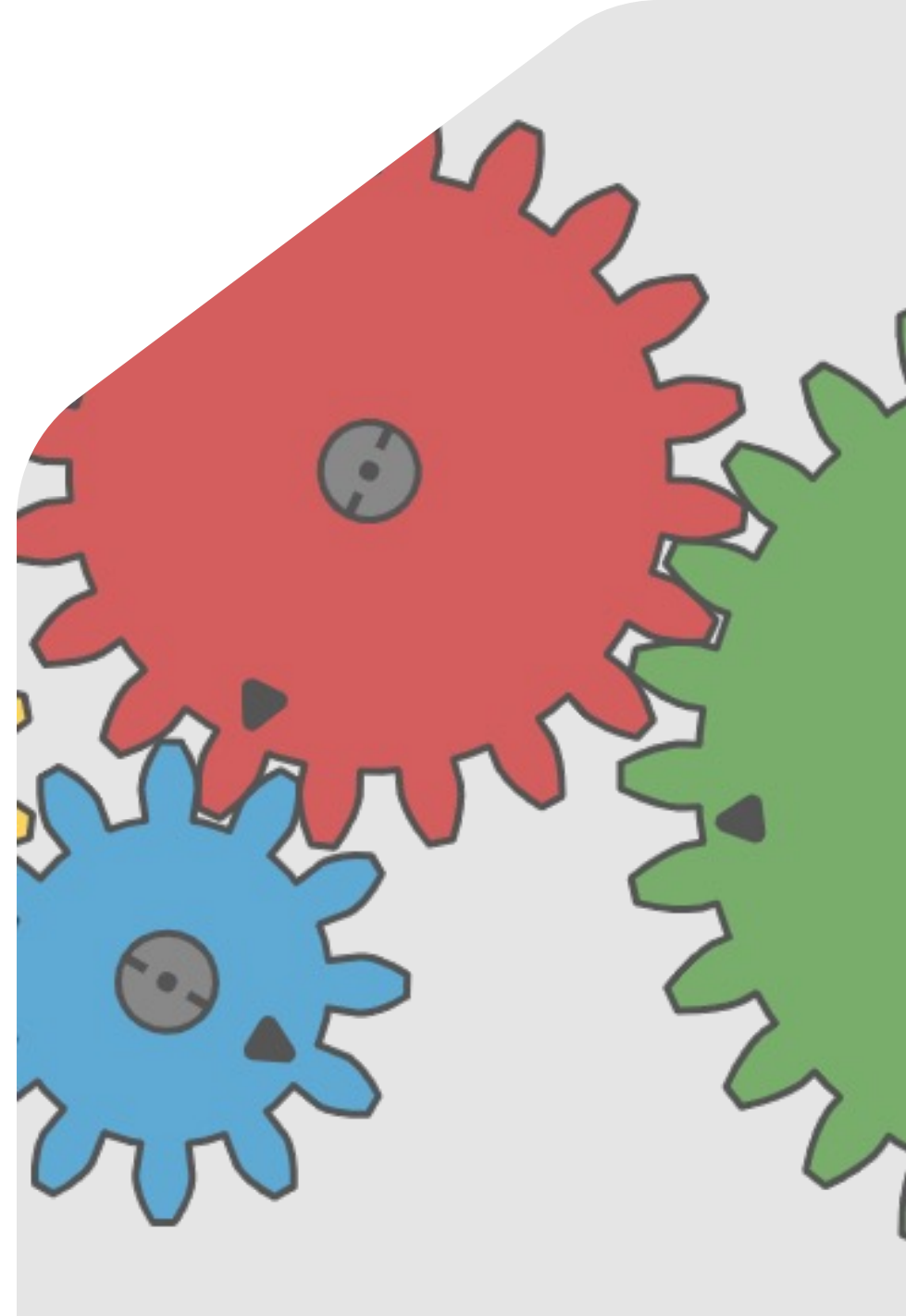
“Never Assume!”

- 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



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



Questions & Answers

Thank You!

ANALYTICS

FOR ALL