



Measuring Analyst Perception with ARchitect



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Agenda



01. About

Twilio, the program, me

02. Getting started with ARchitect

What did we do before?

03. Extending ARchitect for your needs

What we've added to our instance

04. Tracking activities

The foundation

05. Measuring perception

Building up to a dashboard

06. Recommendations

What we've learned



What is Twilio?

The world's leading
Customer Engagement
Platform to build
differentiated
experiences, at scale.



10M+
Developers



280K+
Customers



180+
Countries



You may not know Twilio, but you've used it!

Banking



Morgan Stanley



High technology



Retail



Real estate





Analyst and Influencer Relations team



Saad Qureshi

**Analyst Relations Manager
Communications Platform**



Marsha Bailey

**Director, Customer
Engagement Platforms**



Colin Gersch

**Analyst Relations
Coordinator Generalist**



How did I get here?



Early in my career

Former Product Manager

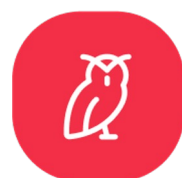
The fateful interview



Moved from being a peer to being the leader

Began with covering security, then took on new areas

Acknowledge the expertise of others



Why Twilio?

Composable applications are revolutionary

Culture of decency and respect



My introduction to ARchitect



Before ARchitect

Custom homegrown application named "ARDB"



Maintenance

Annual "upgrades" before our big event



Late 2013

Less maintenance, less cost, more extensible



Extensibility



Asked for an API in 2018

Wanted to connect our own custom applications



Asked for Google Docs support in 2020

Added for me in a week!



Added 100s of influencers to the database in 2021

I may still build an app



Tracking activities



Helps us better understand our progress

Reviewing who we were engaging with over time helped identify any coverage gaps



Prepares us to scale

Tracking interactions including links to notes made it easier for others to build on the progress we made



The work will be remembered

“If it’s not in ARchitect, it didn’t happen”



Tracking activities

It all starts with engagement

Key to building relationships

Aim for up to 4:1 inquiries to briefings

Source of truth: "If it isn't in ARchitect, it

didn't happen"

ANALYSTS INTERACTIONS CONTENT EMAIL PROJECTS SITE HELP ⚙️ Search



Interactions + Add New Interaction **CALENDAR** **GRID** **REPORT**

🔍 Add Filter(s) 📅 10/01/2022 - 11/10/2022 Search

Custom Report Close

Report Title

Report type List Page



Included Fields
Title, Type, Date, Description, Initiator, ARPrimary, Analyst List, Firms, Coverages/Tags, Participants, Other Participants, Notes

Sort order
Calendar, Created By, Event

Breakout by

Footer Options

Left Center Right

Cancel Run Report



Entering activities

ARchitect as the source of truth

Track progress throughout the year

Repository for notes

See who is participating the most

New Interaction

Cancel Save

Title & Description

Title *

Description *

Basics

Interaction Type *

Date *

End Date

Initiator

ARPrimary

Location

Details

Google Docs URL

Notes

Other Participants

Visibility

Edit Permission

Team Calendar

Analysts

Firms

Participants

Coverages

Project

Attachments



Are activities the ultimate metric?



**No – but they are the
foundation for everything!**



What do you measure in ARchitect?



Measuring perception

Relationships 📄 🔄 Past 6 Months ⋮

Analyst	Infl. Score	Research	Mentions	Percept.	Ints	Last	Next
Julie Ask Forrester Research, Inc.	61.79	26 Published 14 Planned					
Lizzy Foo Kune Gartner Inc.	34.91	3 Published 0 Planned					
Sheryl Kingstone 451 Research	51.87	10 Published 0 Planned					
Liz Miller Constellation Research, Inc.	54.36	19 Published 0 Planned					
Courtney Munroe IDC	67.37	19 Published 9 Planned					

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Measuring perception



Perception captures each moment

Which conversations were the most influential?

Which ones did not go so well?



Each interaction contributes to the overall rating

Ratings have a consistent definition

Still subjective, reliant on your expertise



Get better with more data

Higher interaction volume improves the reliability of the composite score

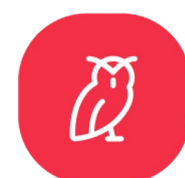


Example: scoring perception

Perception Rating Guide		Examples
1	Highly Negative	Strong detractor; repeatedly mentions your competitors as being stronger than you
2	Negative	Highly favorable to competitors; sees you as a niche
3	Neutral	No apparent negativity but not quite positive; analyst reference would be somewhat neutral
4	Positive	Somewhat favorable but may not see you as the leader; would provide a positive but not glowing reference
5	Highly Positive	Seen as the leader; would provide a great press reference



Recommendations



Adoption is critical

Everyone has to use it consistently



Be consistent

Set standards that everyone uses

Document where it makes sense



Try new things

Adapt ARchitect to your systems

Ask for help



Thank you