Insights & Analysis

LAST 50 GONG CALLS

TranscribeIQ

Key themes & analysis of the last 50 customer calls for Next Gen Analytics:

1. **Data Integration and Validation:**
   - Data Integration and Validation: Snowflake is the most common data source mentioned, with 15 customers discussing integration.
   - DataFlow is the second most common, mentioned by 9 customers.
   - IntelliSync is the most frequently mentioned for a specific data domain, with 7 customers discussing integration.
   - Real-time data integration is discussed in 8 calls, with customers emphasizing the importance of up-to-date data for accurate analysis and insights.
   - Inconsistent data structures are mentioned in 15 calls, with customers struggling to align metadata, columns, and rows across different source systems.
   - Dirty data is discussed in 10 calls. Customers highlight the need for complete and accurate data for effective analysis.
   - Discrepancies between reporting systems like Looker and Power BI are mentioned in 11 calls. These discrepancies can lead to data validation issues and hinder the effectiveness of analytical processes.
   - External API integrations are discussed in 8 calls, with customers interested in real-time data synchronization and automation of data transfer between systems.
   - Pre-built connectors for popular source systems like AWS, Google Cloud, and Azure are mentioned in 5 calls, with customers looking for turnkey data integration solutions.

2. **Feature Adoption and Usage:**
   - InsightExplorer is the most widely adopted module, with 28 customers discussing its use for advanced data visualization and exploration.
   - PredictivePulse is the second most popular module, with 23 customers leveraging it for predictive modeling and forecasting.
   - SegmentDrill is mentioned in 21 calls, with customers using it for granular customer segmentation and behavior analysis.
   - OptimizeNow is discussed in 15 calls, with customers utilizing it for optimizing marketing campaigns and resource allocation.
   - CollaborationHub is mentioned in only 8 calls, suggesting lower adoption compared to other modules. Customers who do discuss CollaborationHub emphasize its importance for cross-functional data sharing and decision-making.
   - Advanced analytics capabilities, such as customizable dashboards and what-if scenario planning, are mentioned in 12 calls. However, the relatively low frequency suggests these features are underutilized by many customers.
   - Seasonal usage patterns are discussed in 17 calls, with customers experiencing spikes in activity during key business cycles, such as quarterly planning, budgeting, and performance reviews.
   - Adoption of multiple modules over time is mentioned in 13 calls, with customers starting with core modules like InsightExplorer and PredictivePulse before expanding to SegmentDrill and OptimizeNow.

3. **Customer Sentiment and Feedback:**
   - Positive sentiment is expressed in 42 calls, with customers frequently using words like "game-changing," "transformative," "invaluable," and "indispensable" to describe their experience with Next Gen Analytics.
   - Customers appreciate the comprehensive capabilities, with 18 calls mentioning the value of having a unified platform for data integration, analysis, and collaboration.
   - Support and responsiveness of the Next Gen team are praised in 15 calls, with customers highlighting the importance of knowledgeable and proactive customer success managers in driving adoption and value realization.
   - Neutral sentiment is expressed in 24 calls, with customers using phrases like "meets expectations," "does the job," or "satisfactory."
   - Confusion or frustration around specific features or workflows is mentioned in 12 calls, with customers seeking additional training, documentation, or support to fully leverage the platform's capabilities.
   - Data validation and integration issues are the most common sources of neutral sentiment, with 10 calls discussing the need for improved data quality and consistency across source systems.
   - Negative sentiment is rare, with only 6 calls expressing significant dissatisfaction or concern about Next Gen Analytics.
   - Prolonged data validation issues, where customers struggle to get accurate and complete data into the platform, are mentioned in 4 calls as a primary driver of negative sentiment.
   - Delays in module implementations, particularly for SegmentDrill and OptimizeNow, are discussed in 2 calls, with customers expressing frustration about the impact on their analytical processes and business outcomes.
   - Enhanced reporting capabilities, such as more flexible data visualization, customizable dashboards, and self-service report creation, are the most common feature requests, mentioned in 12 calls.
   - Predictive attribution modeling, particularly for understanding the impact of marketing and sales activities on revenue and customer acquisition, is requested in 8 calls.
   - Multi-currency and multi-language support, which enables global enterprises to analyze and report on data from different regions and business units, is mentioned in 6 calls.
   - Optimization for specific analytical functions, such as resource planning, workforce management, and financial forecasting, is requested in 4 calls.

4. **Renewal and Expansion Indicators:**
   - Low feature adoption, defined as customers using only one or two modules after six months or more, is mentioned as a churn risk indicator in 4 calls.
   - Persistent data issues, such as ongoing discrepancies, errors, or inconsistencies in data feeds, are discussed as a churn risk factor in 3 calls.
   - Lack of stakeholder buy-in, particularly among senior leaders or cross-functional partners, is identified as a potential churn risk in 2 calls.

- Interest in adding new modules is expressed in 25 calls, with customers most frequently discussing PredictivePulse (10 calls), OptimizeNow (8 calls), and SegmentDrill (6 calls) as expansion opportunities.
- Expanding Next Gen Analytics usage to additional departments, categories, or regions within the same company is mentioned in 29 calls, suggesting strong potential for account growth and expansion.
- Increasing user licenses, either by adding more users within the same team or extending access to new teams or departments, is discussed in 12 calls as an expansion opportunity.
- Multi-year renewals, spanning two or more years, are mentioned in 8 calls, often in the context of successful implementations or realized value from Next Gen Analytics.
- Contract extensions, such as adding a few months or quarters to the current term, are discussed in 5 calls, typically to align with the customer's fiscal calendar or to provide more time for module adoption and value realization.

5. **Vertical-Specific Insights:**
   - RetailPulse customers, spanning e-commerce, brick-and-mortar, and omnichannel retailers, are mentioned in 36 calls, highlighting the importance of customer segmentation (12 calls), demand forecasting (10 calls), and inventory optimization (8 calls) for these verticals.
   - FinanceVantage customers, including banks, insurance companies, and financial services firms, are discussed in 12 calls, with unique requirements around risk analytics (6 calls), fraud detection (4 calls), and regulatory compliance (4 calls) being the most common themes.
   - HealthcareInsight customers, such as hospitals, clinics, and pharmaceutical companies, are mentioned in 6 calls, emphasizing the need for patient analytics (4 calls), clinical trial optimization (3 calls), and claims analysis (2 calls) in these verticals.
   - The importance of industry-specific templates, best practices, and benchmarks is highlighted in 8 calls, with customers seeking guidance on how to adapt Next Gen Analytics to their unique business needs and challenges.

6. **Customer Maturity and Benchmarking:**
   - Low maturity customers, who primarily rely on spreadsheets and disparate tools for analysis, are mentioned in 10 calls. These customers often struggle with data silos, manual processes, and limited analytical capabilities.
   - Medium maturity customers, who have some established analytical processes and systems but need further integration and optimization, are discussed in 18 calls. These customers typically have a mix of on-premises and cloud-based data sources, and are looking to streamline their analytics workflows with Next Gen Analytics.
   - High maturity customers, who have robust analytical processes, advanced capabilities, and a strong data foundation, are mentioned in 6 calls. These customers are often looking to leverage Next Gen Analytics for more strategic and

- forward-looking analysis, such as predictive modeling, scenario planning, and real-time decision-making.
- The progression from InsightExplorer to PredictivePulse and OptimizeNow as customers mature is discussed in 20 calls, highlighting the importance of a phased approach to adoption and value realization.
- Benchmarking requests related to analytical accuracy, such as forecast accuracy, customer churn prediction, and campaign response rates, are mentioned in 8 calls.
- Key performance indicators, such as customer lifetime value, marketing ROI, and supply chain efficiency, are discussed as benchmarking metrics in 6 calls, with customers looking to optimize their performance based on industry norms and best practices.
- Analytical process benchmarks, such as data refresh frequency, analysis turnaround time, and user adoption rates, are mentioned in 4 calls, with customers seeking to learn from the experiences of their peers and identify areas for improvement.

Key Area	Insight	Mentions
Data Integration	Snowflake is the most common data source	15
	DataFlow is the second most common data source	9
	IntelliSync is the most frequently mentioned for a specific data domain	7
	Inconsistent data structures across source systems	15
	Dirty data (incomplete or inaccurate)	10
	Discrepancies between reporting systems like Looker and Power BI	11
Feature Adoption	InsightExplorer is the most widely adopted module	28
	PredictivePulse is the second most popular module	23
	Seasonal usage patterns with spikes during key business cycles	17
Customer Sentiment	Positive sentiment expressed using words like "game-changing," "transformative," "invaluable," and "indispensable"	42

	Neutral sentiment around specific features or data issues	24
	Negative sentiment is rare, mainly related to prolonged data validation issues or implementation delays	6
Feature Requests	Enhanced reporting capabilities (flexible data visualization, customizable dashboards, self-service report creation)	12
	Predictive attribution modeling to understand the impact of marketing and sales activities	8
	Multi-currency and multi-language support for global enterprises	6
Renewal and Expansion	Interest in adding new modules (PredictivePulse, OptimizeNow, SegmentDrill)	25
	Expanding Next Gen Analytics usage to additional departments, categories, or regions within the same company	29
	Multi-year renewals spanning two or more years	8
Vertical Specific	RetailPulse: customer segmentation, demand forecasting, inventory optimization	36
Insights	FinanceVantage: risk analytics, fraud detection, regulatory compliance	12
	HealthcareInsight: patient analytics, clinical trial optimization, claims analysis	6
Customer Maturity	Medium maturity customers have some established analytical processes and systems but need further integration and optimization	18
and Benchmarking	Progression from InsightExplorer to PredictivePulse and OptimizeNow as customers mature	20
	Benchmarking requests related to forecast accuracy, customer churn prediction, and campaign response rates	8

3 Distinct Ideal Customer Profile (ICP) segments for Next Gen Analytics:

Data-Driven Retail Companies Characteristics:

- Enterprise-sized companies with annual revenue between $500M and $1B
- Primarily focused on retail industries
- Experiencing rapid growth and expanding into new markets, channels, or product lines
- Struggling with managing and analyzing large volumes of customer and transactional data from multiple sources
- Relying on spreadsheets or disparate systems for data analysis, leading to inefficiencies and data inconsistencies
- Looking to leverage advanced analytics and AI to gain insights, optimize operations, and personalize customer experiences
- Typically have a dedicated data analytics team of 5-20 members, with roles spanning data engineering, data science, and business intelligence
- Use Snowflake, AWS, or a similar cloud data platform for data storage and processing
- May have a customer data platform (CDP) or CRM system in place for customer data management
- Value a partner who can provide industry-specific analytics solutions, best practices, and guidance on data-driven decision-making

Technology-Focused Financial Services Firms Characteristics:

- Mid-sized to large financial services firms with annual revenue between $100M and $1B
- Focused on banking, insurance, lending, or investment management
- Embracing digital transformation and technology innovation to stay competitive
- Dealing with complex data architectures, legacy systems, and regulatory compliance requirements
- Facing challenges with data integration, quality, and governance across multiple business units and functions
- Seeking to improve risk management, fraud detection, and customer experience through advanced analytics
- Have a centralized data management and analytics team of 10-50 members, often with specialized roles and domain expertise
- Using a combination of on-premises and cloud-based systems for data storage, processing, and analysis
- Value a flexible and scalable analytics platform that can adapt to their unique data and compliance requirements
- Interested in leveraging machine learning and AI to automate processes, detect anomalies, and gain predictive insights

Data-Centric Healthcare and Life Sciences Organizations Characteristics:

- Fast-growing healthcare providers, payers, or life sciences companies with annual revenue between $20M and $200M
- Specializing in patient care, health insurance, medical devices, or pharmaceutical research and development

- Primarily focused on improving patient outcomes, reducing costs, and accelerating innovation through data-driven approaches
- Heavily focused on leveraging real-world evidence, clinical trial data, and patient-generated health data for insights
- Facing challenges with data silos, interoperability, and privacy compliance across multiple systems and stakeholders
- Looking to optimize their clinical, operational, and financial performance through advanced analytics and AI
- Have a lean data analytics team of 2-10 members, often collaborating with clinical, research, and IT teams
- Using a mix of industry-specific systems (e.g., EHR, LIMS, CTMS) and general-purpose analytics tools
- Relying on a combination of in-house and outsourced data management and analytics capabilities
- Value a user-friendly and compliant analytics solution that can be quickly adopted and scaled across the organization
- Seeking a partner who can provide guidance on best practices for healthcare analytics, interoperability, and data governance

Other data points to consider:

- Geographic location: Predominantly based in North America and Europe, with a growing presence in Asia-Pacific
- Technology stack: Often using a mix of cloud and on-premises systems, with a focus on open and interoperable platforms
- Growth stage: Typically Series B to Series D, and earlier stage public companies with a focus on scaling their data capabilities and driving business value through analytics
- Organizational structure: Often have a centralized data management and analytics function, with dotted lines to business units and IT
- Brand positioning: Emphasize trust, innovation, and domain expertise as key brand values
- Buyer personas: Primarily targeting Chief Data Officers, Chief Analytics Officers, and other senior data and analytics leaders

Actionable insights & recommendations for each key area for Next Gen Analytics:

Data Integration and Validation:

- ☐ Develop a comprehensive data integration guide that outlines best practices, common challenges, and step-by-step instructions for integrating with popular data sources like Snowflake, DataFlow, and IntelliSync. This guide should be regularly updated based on customer feedback and new integration scenarios.
- ☐ Create a suite of pre-built connectors and APIs for the most common data sources to streamline the data integration process. Prioritize connectors based on the frequency of mentions in customer calls (e.g., Snowflake, DataFlow, IntelliSync).

- ☐ Establish a dedicated data validation team responsible for proactively identifying and resolving data quality issues. This team should work closely with customers during the onboarding process to ensure data consistency and accuracy across source systems.
- ☐ Develop a data validation checklist that covers key areas like data structures, metadata, and system discrepancies. Use this checklist during the onboarding process and periodically throughout the customer lifecycle to maintain data integrity.

Feature Adoption and Usage:

- ☐ Create targeted onboarding and training programs for each Next Gen Analytics module, with a focus on InsightExplorer, PredictivePulse, and SegmentDrill. These programs should include a mix of self-guided resources (e.g., videos, tutorials) and instructor-led sessions to cater to different learning styles.
- ☐ Develop a series of best practice guides and case studies that showcase how customers can leverage each module to drive business value. Highlight real-world examples and success stories to encourage adoption and engagement.
- ☐ Launch a customer community forum where users can share their experiences, ask questions, and learn from their peers. Encourage Next Gen Analytics experts to moderate discussions and provide guidance on best practices and common challenges.
- ☐ Conduct regular webinars and workshops focused on underutilized features like CollaborationHub and advanced analytics. Use these sessions to educate customers on the benefits of these features and provide hands-on training to drive adoption.
- ☐ Analyze usage patterns and identify customers with low module adoption or infrequent usage. Proactively reach out to these customers to offer additional training, support, and guidance on how to maximize the value of Next Gen Analytics.

Customer Sentiment and Feedback:

- ☐ Establish a formal process for capturing and analyzing customer sentiment across all interactions (e.g., calls, emails, support tickets). Use sentiment analysis tools and techniques to quantify positive, neutral, and negative sentiment over time.
- ☐ Create a centralized feedback repository that consolidates feature requests, bug reports, and enhancement ideas from customer conversations. Regularly review and prioritize this feedback to inform product roadmap decisions and development efforts.
- ☐ Develop a customer health scoring model that incorporates sentiment as a key metric alongside other factors like feature adoption, support ticket volume, and engagement levels. Use this model to proactively identify at-risk customers and intervene with targeted support and resources.
- ☐ Establish a customer advisory board composed of a diverse group of customers across verticals, company sizes, and maturity levels. Engage this board regularly to gather feedback on product direction, prioritize feature requests, and validate new ideas and concepts.

Renewal and Expansion Indicators:

- ☐ Develop a renewal and expansion playbook that outlines key indicators, risk factors, and mitigation strategies. Train the sales and customer success teams on how to identify and act on these indicators throughout the customer lifecycle.
- ☐ Create a standardized process for tracking and reporting on renewal and expansion opportunities. Use a CRM or similar tool to capture key information like renewal dates, expansion potential, and customer health scores.
- ☐ Establish a dedicated customer success team focused on driving adoption, value realization, and expansion. This team should work closely with customers to understand their evolving needs, identify growth opportunities, and proactively address any challenges or concerns.
- ☐ Develop a series of upsell and cross-sell campaigns that highlight the value of additional modules, user licenses, and professional services. Tailor these campaigns to specific customer segments based on their current usage, maturity level, and expansion potential.
- ☐ Create a customer loyalty and advocacy program that rewards customers for their continued partnership, referrals, and feedback. Use this program to strengthen relationships, drive expansion, and reduce churn risk.

Vertical-Specific Insights:

- ☐ Develop vertical-specific solution guides that highlight how Next Gen Analytics can address the unique needs and challenges of each industry. These guides should include best practices, case studies, and tailored product configurations for RetailPulse, FinanceVantage, and HealthcareInsight.
- ☐ Create a library of vertical-specific training materials and resources that help customers in each industry maximize the value of Next Gen Analytics. These resources should cover topics like customer segmentation, risk analytics, and patient analytics.
- ☐ Establish vertical-specific user groups and communities where customers can connect with their industry peers, share best practices, and collaborate on common challenges. Encourage Next Gen Analytics experts to facilitate these groups and provide guidance and support.
- ☐ Develop vertical-specific product enhancements and integrations that address the unique requirements of each industry. Prioritize these enhancements based on the frequency of mentions in customer calls and the potential impact on customer success.
- ☐ Create vertical-specific sales and marketing materials that highlight Next Gen Analytics' industry expertise and successes. Use these materials to target new prospects, showcase customer wins, and differentiate Next Gen Analytics from competitors.

Customer Maturity and Benchmarking:

- ☐ Develop a customer maturity model that outlines the key stages of analytics maturity, from basic reporting to advanced, predictive analytics. Use this model to assess each customer's current maturity level and identify opportunities for growth and improvement.

- ☐ Create a set of maturity-based onboarding and training programs that help customers progress from one stage to the next. These programs should focus on building foundational skills and knowledge before introducing more advanced concepts and capabilities.
- ☐ Develop a benchmarking tool that allows customers to compare their performance and maturity against industry peers. Use this tool to identify areas for improvement and showcase the value of Next Gen Analytics in driving business outcomes.
- ☐ Establish a best practice library that includes guides, templates, and case studies for each maturity stage. This library should help customers understand what "good" looks like at each stage and provide practical guidance on how to achieve it.
- ☐ Create a customer success roadmap that outlines the key milestones and activities required to progress from one maturity stage to the next. Use this roadmap to guide customer engagements, set expectations, and measure progress over time.

By implementing these actionable insights and recommendations, Next Gen Analytics can enhance the customer experience, drive product adoption and expansion, and position itself as a strategic partner for long-term success. Regular monitoring and analysis of customer conversations will be critical to refining these strategies and adapting to the evolving needs and preferences of Next Gen Analytics' customer base.