AIVO MERIDIAN / REPUTATION REPORT

# Recognised. Understood differently by every audience.

Financial information company | Anonymised baseline extract

## What your team receives

An audience-level baseline, evidence behind the judgments, and an action register that assigns the next steps to the teams who can act.

| NAMED UNPROMPTED | RECOMMENDED OUTRIGHT |
|---|---|
| 78.6% Of opening answers | 38.6% Of complete conversations |

## The executive finding

The company was widely recognised, but recommendation outcomes differed sharply by stakeholder audience. A company-wide average would have hidden the weakest areas.

## What was measured

360 four-turn conversations, 1,440 turns, four stakeholder audiences and five configurations across four assistant families. Six reputation dimensions were assessed alongside recommendation outcomes.

## About this sample

Adapted from a completed AIVO baseline. Company, research partner, competitor, business-unit and source names have been removed. Selected measured results are retained; some descriptions are generalised. Recommendation rates are distinct from AI RQ scores.

01 / AUDIENCE FINDINGS

# One audience chooses the company. Three are less convinced.

Outright recommendations and unprompted opening mentions, by audience.

| AUDIENCE | WON OUTRIGHT | NAMED |
|---|---|---|
| Retail investors | 94.4% | 95.6% |
| Regulator / governance | 27.8% | 83.3% |
| Potential employees | 17.8% | 57.8% |
| Institutional investors | 14.4% | 77.8% |

## What sits behind the institutional result

In institutional conversations, 41.1% ended in a shared recommendation. Across the study’s institutional lens, 72.5% cast the company as a specialist or complement. Competitor A took 23 of the 30 institutional losses.

## What the sources reveal

Of 17,973 cited sources, 20.3% were company-owned, 9.4% competitor-owned and 70.3% other third parties. The report examines what those sources say, not just how often the company is cited.

## How to interpret this

These observations identify questions for communications, product and leadership teams. They do not establish that changing a page will cause a recommendation to change, or quantify revenue at risk.

02 / THE ACTION REGISTER

# Every action traces to evidence

Selected actions, adapted to remove identifying details.

| FINDING | ACTION | RESPONSIBLE TEAM |
|---|---|---|
| An alleged conflict-of-interest argument appeared in 26.4% of conversations. | Publish a durable, evidenced answer to the argument. | Legal + communications |
| The company was positioned as a complement in 72.5% of institutional conversations. | Publish evidence of institutional breadth and workflow capability. | Product marketing |
| Legacy naming appeared more often than current naming. | Standardise the current name and update the boilerplate. | Brand + communications |
| Retail framing weakened the account given to regulators. | Lead audience pages with the relevant institutional capabilities. | Brand + business units |
| Different audiences were lost to different rivals. | Address the competitor and decision criteria relevant to each audience. | Competitive intelligence |

## A testable programme

Assign owners, review the supporting evidence and agree the changes. Re-measure comparable questions after implementation, recording model and retrieval changes. Optional draft testing can assess whether proposed material answers the observed objection.

## Method and limits

90 conversations per audience; opening, comparison, objection and recommendation turns. Five configurations included one assistant with and without web access. This is a baseline, not measured improvement. Human survey scores and AI RQ scores are separate instruments. The full client deliverable contains further evidence, source analysis and implementation detail.

## Explore a reputation study

aivocorp.com/reputation

03 / DASHBOARD OVERVIEW

# The baseline, at a glance

Anonymised dashboard data view | Financial information company

Recreated from supplied dashboard screenshots. Values are retained; client, partner and competitor names, account details and branding have been removed. This is a static sample, not a live dashboard.

| COMPOSITE AI RQ | HIGHEST CONFIGURATION | LOWEST CONFIGURATION |
|---|---|---|
| 65.7 / 100 | 72.9 ChatGPT with retrieval | 49.5 Claude |

## A 23.4-point spread between configurations

The dashboard makes differences between assistants visible. A single average would conceal the variation. AI RQ scores are distinct from outright recommendation rates.

| SUMMARY | SCORE |
|---|---|
| Strongest stakeholder: retail investors | 90.9 |
| Weakest stakeholder: regulator / governance | 56.7 |
| Strongest dimension: trust | 74.4 |
| Weakest dimension: relevance | 58.1 |

## From the score to the work

The supplied interface includes an action centre with three evidence requests awaiting input, alongside sections for dimensions, stakeholder audiences, competitors, findings, evidence and remediation.

## Coverage note

The source screenshots describe three models in the overview, while the accompanying baseline report describes five configurations across four assistant families. These extracts do not resolve that coverage difference. Confirm the configured coverage before using this view as a specification for a commissioned study.

04 / REPUTATION GRID

# See the differences an average hides

Dimension scores by stakeholder audience. Values reproduced from the dashboard.

| Dimension | Retail investors | Potential employees | Institutional investors | Regulator / governance | Mean |
|---|---|---|---|---|---|
| Trust | 92.2 | 70 | 72.2 | 63.3 | 74.4 |
| Vision | 92.2 | 65.6 | 53.3 | 62.2 | 68.3 |
| Products & services | 92.2 | 52.2 | 55.6 | 63.3 | 65.8 |
| Relevance | 97.8 | 50 | 50 | 34.4 | 58.1 |
| Ethics | 81.1 | 54.4 | 61.1 | 55.6 | 63.1 |
| Culture | 90 | 56.7 | 48.9 | 61.1 | 64.2 |
| Stakeholder mean | 90.9 | 58.2 | 56.9 | 56.7 | 65.7 |

## The practical reading

Retail investors receive a consistently strong account. Institutional relevance and culture are weaker, while regulator relevance is the lowest cell at 34.4. This view helps teams choose where to investigate the supporting conversations.

## Read the numbers, not just the colours

The numeric scores are preserved. Colours are recreated for legibility and do not reproduce or define the original dashboard's scoring thresholds. Scores reflect the supplied baseline, not customer sentiment or measured sales.

05 / COMPETITOR OUTCOMES

# Who gets the recommendation instead?

Outright wins by audience. Ninety conversations per audience.

| Outcome | Retail | Employees | Institutions | Regulators | All |
|---|---|---|---|---|---|
| Focal company | 85 | 16 | 13 | 25 | 139 |
| Competitor A | 0 | 11 | 23 | 8 | 42 |
| Competitor B | 0 | 4 | 2 | 21 | 27 |
| Competitor C | 0 | 7 | 4 | 4 | 15 |
| Competitor D | 0 | 2 | 0 | 5 | 7 |
| Competitor E | 0 | 2 | 0 | 1 | 3 |
| Other providers | 2 | 1 | 1 | 1 | 5 |

## Presence and selection are different measures

| Competitor | Named in / 360 | Outright wins | Wins / mentions |
|---|---|---|---|
| A | 354 | 42 | 11.9% |
| B | 346 | 27 | 7.8% |
| C | 354 | 15 | 4.2% |
| D | 355 | 7 | 2.0% |
| E | 334 | 3 | 0.9% |

## What the team can investigate

Competitor A takes 23 institutional recommendations; Competitor B takes 21 regulator recommendations. The evidence and action register can address the different reasons each audience chooses a rival.

## Counting note

Rows show outright wins only and do not exhaust all 360 conversations. Shared recommendations and no-pick outcomes are excluded from this table. “Wins / mentions” is the share of conversations mentioning that competitor that ended in its outright win; it is not a purchase conversion rate.