InvestorHub Internship Hiring Task

Engagement Metrics ● Hub UX ● Internal Update

Data-driven engagement diagnosis, prioritized UX recommendations (case study)

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Activity 1

InvestorHub engagement happens through **two channels**: **Email (open rate)** and **platform usage (InvestorHub views)**. Because companies have different shareholder counts, we use **normalized metrics** to compare fairly.

Views per Shareholder = Views / Active Shareholders
Estimated Email Opens = Active Shareholders × Open Rate

| Company	Active Shareholders	InvestorHub Views	Email Open Rate	Views per Shareholder	Estimated Email Opens
Company 1	4200	1860	42%	0.44	1764
Company 2	**1050**	**210**	**18%**	**0.20**	**189**
Company 3	2600	1200	38%	0.46	988
Company 4	6800	3450	55%	0.51	3740

Views per Shareholder (Platform Engagement)
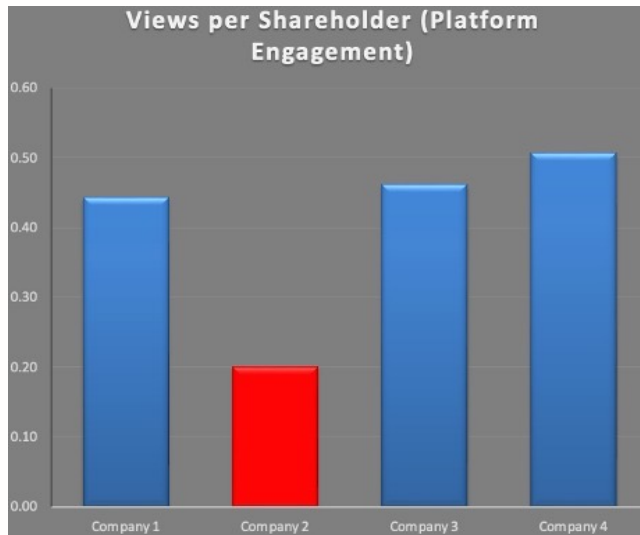
Finding: Company 2 Group is the least engaged company: lowest email engagement and lowest platform usage per shareholder.

- **Platform usage: 0.20 views/shareholder** (peers: **0.44–0.51**) indicating shareholders rarely visit the hub
- **Email engagement: 18% open rate** with only **189 opens** from **1,050** shareholders
- **Multi-channel gap:** Company 2 underperforms on **both** channels, so this isn't a one-off issue

Two additional lenses are used:

1. **Comparative Benchmarking** (gap vs peer average) – Compared with each company to the **peer average (excluding Company 2)** to quantify under/over-performance. **Variance % = (Company − Peer Avg) / Peer Avg**
2. **Engagement Efficiency** (value per $ paid) - Measure platform usage relative to plan spend (ROI proxy).
   **Views per $1k = Views / (Plan Value/1000)**
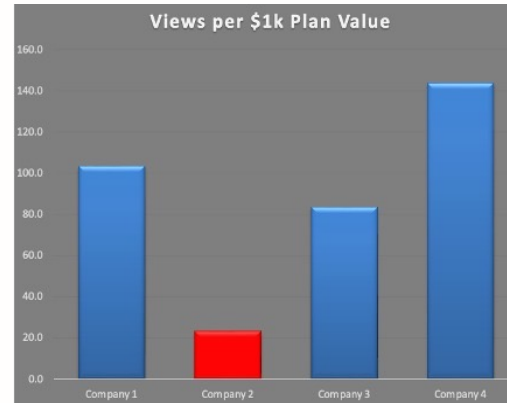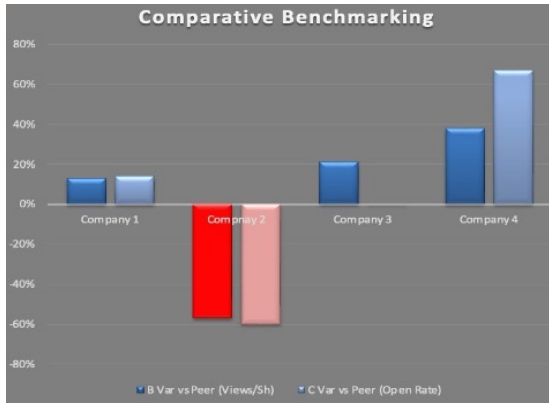
Conclusion

- **Severe multi-channel gap:** Company 2 is **–57% vs peers** on *Views/Shareholder* and **–60% vs peers** on *Email Open Rate* → materially below the "healthy" peer baseline.
- **Lowest value realization:** Company 2 delivers only **23.3 views per $1k** (peers: **83–144**) → high risk as they don't perceive ROI, weak value capture and low traffic.
- **Implication:** Company 2 is the clearest **churn-risk** account and should be prioritized for a short engagement uplift plan.

Actionable Insight (Sales/CS): Engagement Uplift Sprint <mark>**Priority account:** Company 2 (highest renewal risk).</mark>

Company 2's engagement gap indicates **low adoption and weak value realization**, increasing renewal risk. InvestorHub's **Direct-to-Investor (D2I) methodology** is built to overcome this.
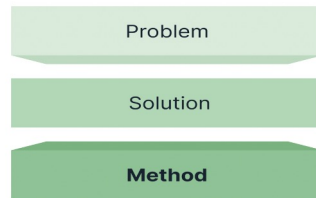
Goal (14–21 days):

Lift usage across **email and hub** with measurable uplift and a repeatable playbook.

Sprint plan

- **Baseline and targets:** Use current performance as the baseline and target uplift to **25–30% open rate** and **0.30+ views/shareholder** within 2–3 weeks.
- **Fix distribution:** Use InvestorHub tracking and workflows so every update is delivered reliably.
- **Improve Content: :** Rewrite Company 2's next two announcements into short, narrative-led milestone posts with clear CTAs ("what changed / why it matters / what's next")
- **Activate and test :** 1 webinar/Q&A with rapid A/B tests (to test subject lines and send time to optimize emails)

Success metrics: Open rate, CTR, views/shareholder, repeat visits, webinar attendance/replay
Expected outcome: Higher engagement with stronger perceived ROI and reduced churn risk

Problem

Solution

Method

Optimise

Attract

Convert

Engage
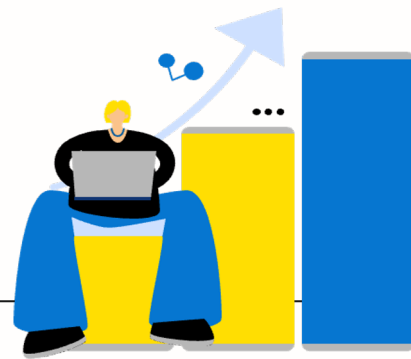
Activity 2   Airtasker Investor Hub: UX gaps

Airtasker

A homepage module that auto-surfaces **Latest Results** with 1-click buttons: **Results Deck | Release | Webcast Transcript** and Next key date. Investors land asking "what's latest?" and this removes search time.

Expected benefit: Higher engagement with results materials, lower bounce and more informed investors.

Measure: CTR to results pack, deck downloads, webcast plays, time-to-first-click.

HubSpot IR — Featured Presentation module (latest results surfaced above the fold). On the Right, Opera IR — KPI stat cards (key metrics scannable immediately).
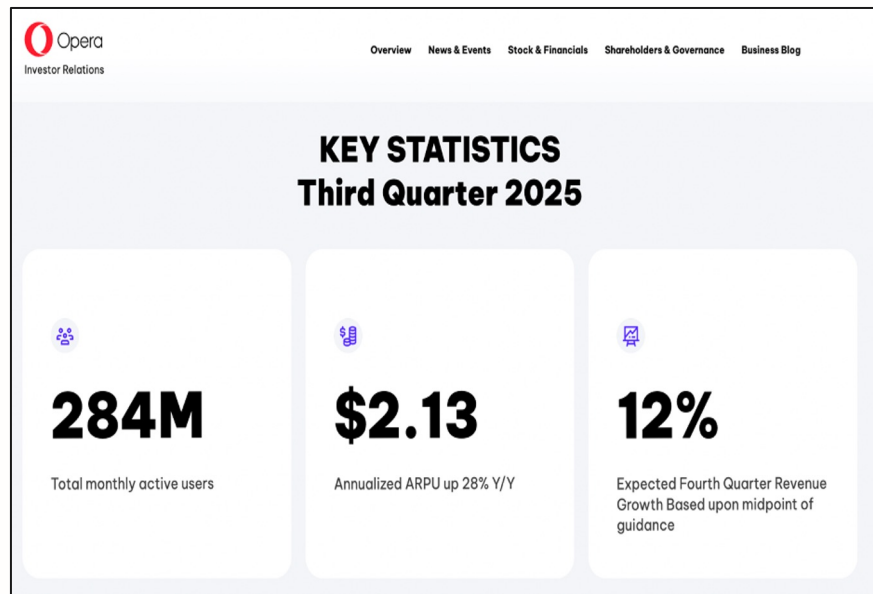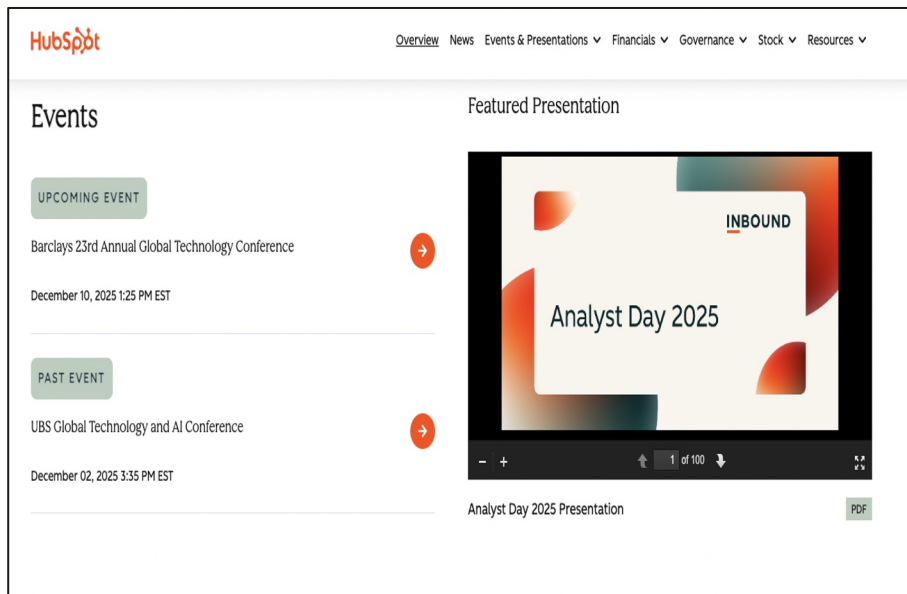
Recommendation 2 — Key Metrics Dashboard

A **Key Metrics** page showing 6–10 publicly reported KPIs with **mini trends (6–8 periods)** and **definitions** and **links back to source announcements/decks**. *(As seen in Opera IR - previous slide)*
 It Removes dependency on PDFs for basic understanding and supports quick comparison.
 Expected benefit: Higher time-on-site and repeat visits (becomes the reference page).
 **Measure:** views of KPI page, repeat visitors, scroll depth, clicks from KPIs → source docs.

Recommendation 3 - Proper Subscribe / Alerts and Calendar loop

Airtasker has Follow and footer Stay in the loop subscribe, but it's **not a primary action** and doesn't guide investors back at key moments.
Thus, **Promote Email Alerts**: add a visible CTA on **homepage and announcement pages and results pages.** Upgrade to a **Preference Center** (tick-box alerts): ASX filings / Results / Presentations / Events / Share price updates.

Add **Add-to-Calendar** buttons on Reporting Calendar and webinar pages (Google/Outlook/ICS).

Expected Benefit - Higher repeat engagement + better event attendance/replay + stronger distribution reach.

NVIDIA IR — Email Alerts as a primary investor action (clear CTA and dedicated alerts section).
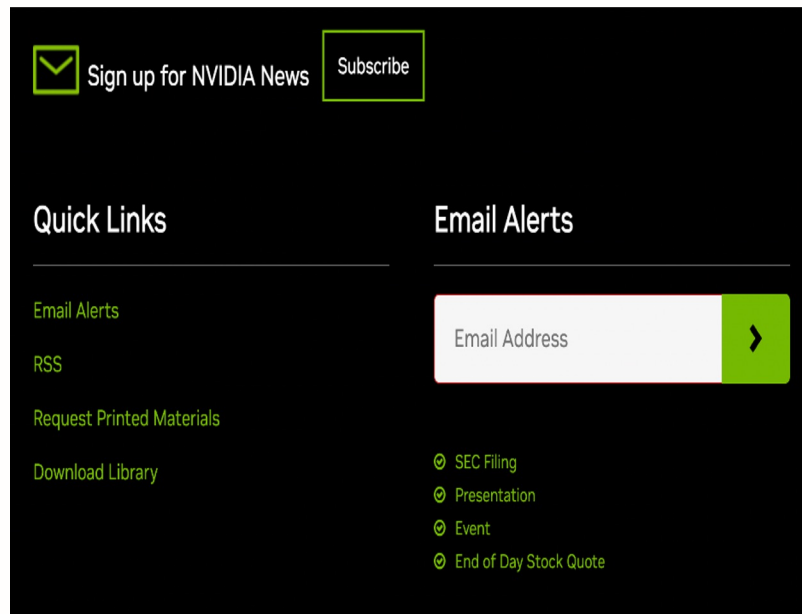
Recommendation 4 - Turn "Ask a question" into a searchable investor knowledge base (Q&A becomes an asset)

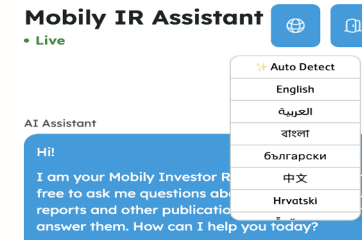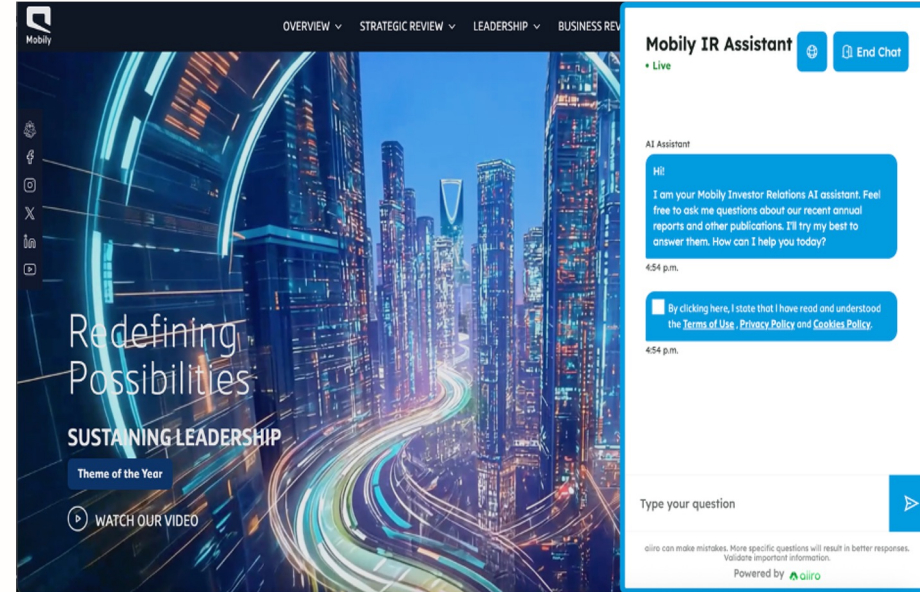**Airtasker** now has Q&A on announcements, but answers aren't reusable/searchable.

Recommendation:

- "Top questions this quarter" module

- Searchable, human-reviewed Investor FAQ/KB

- Related Q&As on results/announcement pages

- IR-only AI assistant (answers only from approved IR content + cites sources) and supports multiple languages.

This ensures faster answers, fewer repeats and higher trust.

Benefit: Less repetitive IR support and deeper engagement on results pages.

Measure: FAQ searches, Q&A views, repeat-question drop, CTR to source docs, time-on-site.

Mobily IR — IR assistant pattern for fast investor Q&A and guided discovery of investor materials with multilingual support

REFERENCES

Company	Views/Shareholder	Peer Avg Views/Shareholder	Var vs Peer (Views/Sh)	Email Open Rate	Peer Avg Open Rate	Var vs Peer (Open)
ALP Limited	0.44	0.39	13%	42%	37%	14%
Company 2 Group	0.2	0.47	-57%	18%	45%	-60%
DLT Mining	0.46	0.38	21%	38%	38%	0%
GMX Tech	0.51	0.37	38%	55%	33%	67%
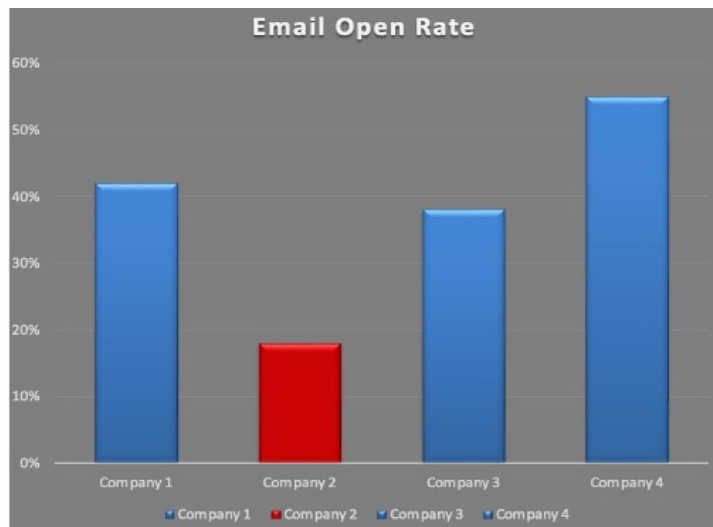
Email Open Rate

Internal analysis table (Activity 1): Normalized engagement metrics and peer-average benchmarking and variance calculations.
The graph here shows the email open rate.

External reference examples (Activity 2):
1. HubSpot Investor Relations — "Featured Presentation" / results surfaced above the fold
2. Opera Investor Relations — "Key Statistics" KPI cards (scannable metrics layout)
3. NVIDIA Investor Relations — "Email Alerts" signup + preference-style alerts
4. Mobily Investor Assistant — IR chatbot example (IR support pattern + multilingual)

Activity 1 – Excel working

Thank you for your time!

Happy to answer any questions.

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