

Auditing Your Financial Narrative in the AI Era

A Practical Guide to Conducting
Your Own AI Perception Study





Answer engines are rapidly becoming the first stop for questions that used to begin with a sell-side note, an earnings transcript, or a late-night Google search... and it's not just retail investors kicking the tires.

Institutional investors, analysts, portfolio managers, journalists, and even internal strategy teams are increasingly using large language models (LLMs) to get oriented quickly, test a thesis, or sanity-check a quarter before going deeper.



The audience has expanded, and the stakes are higher than ever.

That shift changes the job of Investor Relations in a subtle but important way. It's no longer enough to ask whether your disclosures are accurate or compliant. You also have to ask whether they are being understood, and interpreted clearly, by the systems (or middlemen) now answering investor questions and shaping perception at scale.

As a practical start, IR teams should be auditing their own financial narrative by conducting routine AI perception studies, verifying that the answers being generated from your public information reflect the narrative, priorities, and guardrails you intended to set. While this may feel overwhelming at first, it's a worthwhile investment of time and effort.

1 Start with Consistency

Define a fixed set of investor-grade questions covering performance, drivers, segments, risks, outlook, and thesis. Lock the wording. Run the same questions every month or quarter. If the questions change, the signal disappears.

2 Validate Accuracy and Weighting

Separate what's incorrect from what's misweighted. Look for invented drivers, collapsed segments, outdated quarters, or over-indexed risks. Assess each answer for accuracy, emphasis, and completeness.

3 Follow the Sources

Identify which disclosures AI is leaning on... earnings releases, call transcripts, decks, blogs, or third-party coverage. Gaps in answers usually trace back to gaps in structure, clarity, recency, or even outdated and orphaned content.

4 Re-Run & Track Drift Over Time

Ask the same questions again. Compare results quarter over quarter. Improvement, or drift, becomes visible quickly when the process is disciplined.

For IR teams, this isn't about chasing AI. It's about ensuring that when investors ask machines what happened, why it mattered, and what's next, the answers reflect the story you intended to tell.

5 Audit the AI Answers

Run those prompts across the AI engines your investors actually use (ChatGPT, Gemini, and Perplexity cover 85% of traffic). Capture the answers, tone, and citations. You're not judging eloquence, you're checking whether the facts, emphasis, and conclusions align with management intent.

6 Look for What's Missing

Inaccurate answers are easy to spot. More often, AI produces summaries that feel complete but leave out what you would expect to see: key drivers behind performance, clear segment distinctions, current timeframes, or context that explains why results changed. These omissions can quietly reshape perception and, in some cases, surface later as investor questions based on information management never explicitly stated.

7 Fix the Inputs to Manage to the Model

Apply the SOAR Content Framework™:

Structure: Move key messages up and repeat them consistently.

Originality: Replace generic language with clear drivers and causality.

Authority: Anchor claims to data and decisions.

Recency: Make the latest quarter unmistakable and dominant.



Standard AI Perception Study Prompt List

Establishing a Baseline Understanding

Does AI get the headlines right?

1. Summarize [Company]'s [Quarter] [Year] results in plain language."
2. "What were the three most important financial outcomes for [Company] this quarter?"
3. "How did [Company] perform versus expectations this quarter?"
4. "What changed quarter-over-quarter for [Company] across revenue, margins, and cash flow?"

Driver Attribution

Does AI understand WHY results changed?

1. "What were the primary drivers of revenue growth (or decline) for [Company] this quarter?"
2. "Which factors most influenced [Company]'s margin expansion or compression?"
3. "How much of [Company]'s performance was driven by volume, pricing, mix, or one-time items?"
4. "What operational decisions most impacted [Company]'s results this quarter?"

Segment & Business Contribution Clarity

Are your segment disclosures machine-readable, parsable, and distinct?

1. "Break down [Company]'s quarterly performance by business segment."
2. "Which [Company]'s segment contributed the most to growth this quarter and why?"
3. "Which [Company]'s segments underperformed, and what explanations were provided?"
4. "How did [Company]'s segment mix change versus last quarter and last year?"

Risk & Headwind Interpretation

Does AI echo your framing of risk, or over-rotate on macro trends or generic noise?

1. "What risks did [Company] highlight this quarter?"
2. "Which [Company] headwinds are near-term versus structural?"
3. "What [Company] risks are new this quarter compared to prior periods?"
4. "How is [Company] management mitigating the most material risks?"

Forward-Looking Signals & Guidance

Is forward-looking guidance clearly articulated and interpreted?

1. "What guidance did [Company] provide for the next quarter and full year?"
2. "What assumptions underlie [Company] management's outlook?"
3. "What did [Company] management sound most confident about going forward?"
4. "What uncertainties could cause [Company] results to differ from guidance?"

Investment Thesis

How does AI summarize investment thesis positioning?

1. "What single sentence best explains [Company]'s performance this quarter?"
2. "What should [Company] long-term investors take away from this quarter?"
3. "What changed in the investment thesis for [Company] after this quarter's results?"
4. "What would a bearish and bullish interpretation of [Company]'s quarter's results be?"

Comparative Context

How does AI compare your company's results to peers?

1. "How did [Company]'s performance compare to peers this quarter?"
2. "In which areas did [Company] outperform or underperform its sector?"
3. "What differentiates [Company]'s results from competitors this quarter?"
4. "Within [Company]'s sector, what company has the strongest outlook for long-term investment?"

AI Visibility Check

Test how answer engines view your owned, disclosed content.

1. "If an investor asked, 'Is [Company] executing well?' how would you answer using only public disclosures, including the company's IR Website?"
2. "What facts about [Company]'s quarter are most likely to be cited by an AI Answer Engine?"

PRO TIP

Re-run select prompts using a specific stakeholder perspective to test how AI frames guidance and conclusions.

"Act as though I am an analyst from [Institution]. What guidance would you offer me about [Company]?"



The SOAR Content Framework™ Checklist

Structure

- ☒ Headline matches schema headline
- ☒ “Key Facts” section present and bulletized
- ☒ Entities, dates, and numbers clear
- ☒ Canonical URL and publisher metadata included

Originality

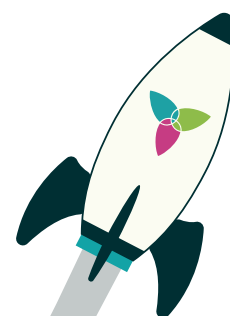
- ☒ At least one first-party data point
- ☒ At least one named human (quote)
- ☒ At least one unique insight, brand, or partner reference
- ☒ Canonical URL and publisher metadata included

Authority

- ☒ Published on official domain
- ☒ Organization identified in schema
- ☒ Spokesperson and media contact listed
- ☒ Consistent content across wire and owned site

Recency

- ☒ Accurate publication and modified dates
- ☒ “As of [date]” included in body
- ☒ Fast follow-up within 24–72 hours
- ☒ Syndicated to trusted destinations the same day





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