SageCircle's Annual Advisory Service

Extend your staff with an AR expert

Do you wish you had a lifeline for AR advice and best practices?

The Power and Flexibility of Phone-based Inquiry

Research and tools need to be tailored to clients' situations. SageCircle emphasizes the use of phone-based inquiry through its Advisory Service which is your lifeline when you need timely access to an AR and analyst expert to exploit an opportunity or mitigate a problem. The Annual Advisory Service is a retainer-style product that permits clients to pick up the phone and speak with a strategist on-demand.

Research…Experience…Insights…Training…Advisory

For more information e-mail info@sagecircle.com or call 650-274-8309

sagecircle™

SageCircle strategists understand your opportunities, challenges and priorities because we have been AR practitioners and executives. Issues that we can help you with include but are by no means limited to:

- Turning around a problem analyst
- Fine tuning an analyst briefing presentation
- Providing the framework for an executive buddy program
- Determining the relevance of an unfamiliar analyst firm
- Reviewing analyst lists
- Role playing a potentially tricky inquiry or briefing

What clients say…

"Carter is one of the leading thinkers and researchers about the industry analysts and the analyst relations profession. He is an engaging presenter and effectively handles executives who are skeptical about working with the analysts. Carter carefully listens to truly understand the crux of your business and situation before providing his insights and advice."

Peggy O'Neill, VP of Analyst Relations, Oracle Corp.

The 14-point Checkup – Maximizing Contract Value

To ensure that clients get the maximum value from their Advisory Service contract, SageCircle strategists conduct periodic 14 Point Checkups with each client to identify inquiry opportunities. These checkups include topics such as: upcoming analysts interactions, analyst contract renewals, AR plans, hot issues, action lists, and more to identify potential items for an inquiry. Each of the items on the check up can generate one or more inquiries with members of the client's AR team.