

Maximizing Analyst Consulting Days Mini-Workshop

Balancing Risk and Reward

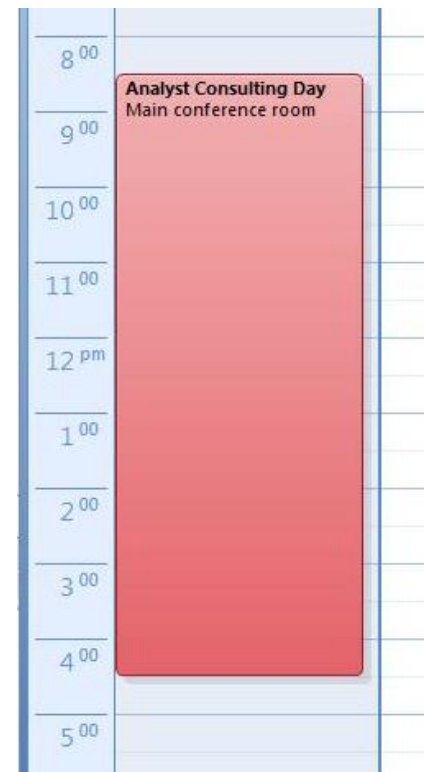
You want to drive maximum value from an analyst consulting day, but don't have the processes or tools. What to do?

Don't re-invent the wheel

Vendors are increasing the usage of analyst consulting days. If done correctly, they can have a great ROI. If done poorly, these engagements are a waste of time, money and AR's political capital. Plus, there are the added risks of hurting your company's relationship and standing with the analyst.

The problem is that neither the analysts nor the vendors have a proven approach to ensure that the analyst consulting day will deliver value to the client.

SageCircle's Maximizing Analyst Consulting Days Mini-Workshop gives AR teams the knowledge, best practices and tools needed to ensure a successful engagement.



Research...Experience...Insights...Training...Advisory

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



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Besides talking with the best AR practitioners about how they conduct analyst consulting days and soliciting input from analysts, SageCircle strategists bring to the problem their experience of conducting many analyst consulting days. The resulting solution incorporates the best of research and experience to create a “cookbook” that makes it easy for our clients to execute. The mini-workshop addresses:

- The reasons for doing analyst days and the attitude to bring to the engagement
- Picking the right analyst (it might not be the obvious choice)
- Planning (including checklist)
- Negotiating with the analyst firm (including checklist)
- Training your colleagues (including checklist)
- Logistics (including two checklists)
- Pre-briefing the analyst

What clients say...

“No matter what the perspective, when it comes to analyst relations - you will not find anyone in the business who is more knowledgeable than Carter. I've worked with Carter at three companies and am always amazed at his unconventional, yet comprehensive take on the technology industry. Now that he has served in all capacities - technology provider, analyst, analyst relations, and consultant - Carter covers all the bases for unbiased results. I recommend him 100%.”

Cynthia Holladay, Upright Marketing

Phone-based inquiry is part of the mini-workshop deliverable. Typical questions that come up while preparing for an analyst day:

- The firm is now saying that our original analyst can't make the day, what should we do?
- Our CTO has to go visit a client, will her deputy do or will we look bad to the analyst?
- The analyst firm sales rep wants to attend. Do we have to permit this? What is upside/downside?
- One of our executives is reluctant to share non-public information with the analysts, what do we do?
- How do we measure success?

Pricing for this phone- and webinar-delivered engagement:

Maximizing Analyst Consulting Days Mini-Workshop - \$695 as a standalone purchase

Standard deliverable for Advisory Service clients

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