

SageCircle's Custom Training

Listening to understand your needs

Building skills and knowledge

The stakes are high

The communications and IT markets are highly cutthroat with every player looks for an edge. Working effectively with the industry analysts can give vendors a competitive advantage driving sales and building brand value. To excel in influencing the analysts, it is necessary to have the right foundation of knowledge about the analysts and analyst relations skills.



SageCircle focuses on your requirements

SageCircle's training courses are developed to provide actionable, practical advice in a short and succinct manner. Each session can be tailored for the needs of a specific constituency or a mixed audience. Because each client is different, SageCircle works to design a training curriculum that meets the specific needs of that organization, drawing on SageCircle's extensive library of training content.

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

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



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Topic Catalog

SageCircle clients can draw upon over 32 hours of proven class content to create a training agenda that meets their needs. Available topics include (but are not limited to):

AR Effectiveness Modules

- Perception versus Reality: Myths and Impact
- 4 I's of AR
- Analyst Landscape and Methodologies
- Tiering the Analysts
- Using a Mix of Interactions to Stay Top of Mind
- Preparing for Analyst Interactions
- Building & Critiquing the Analyst Presentation
- Briefing Execution
- Maximizing Analyst Consulting Days
- Maximizing analyst conference attendance
- Staying Top-of-Mind between Announcements
- Inquiry best practices
- Analysts and Press: leveraging the differences
- Using Analyst Relationship Manager tools
- Trends: Using new social media (e.g., blogs)

Advanced (Strategic) AR Modules

- Deep Dives
- AR & PR Collaboration: 1 + 1 = More than 3
- Leveraging analyst contracts
- Recurring research campaigns (MQ, SEM)
- Gartner Vendor rating campaign
- AR-Sales Partnership
- Creating a new product category
- Influencing the research agenda (e.g., regular research or a new Magic Quadrant)
- Merger & Acquisition campaigns
- Dealing with the problem analyst
- Being analyst centric
- Creating killer case studies
- The emerging technology research agenda (e.g., Hype Cycle, Predicts)

Exercises

- Mock briefing and mock end-user client inquiry as illustrations
- Role-playing various analyst styles
- Building a presentation
- Critiquing existing material (e.g., presentations, case studies, white papers)

Client specific

- AR policies and procedures
- State of the analyst relationships discussion
- AR goals discussion
- What Analyst Firm Services are Available

Applying ARchitect™

- Value of using ARchitect
- Tips on using ARchitect to make the job easier

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Presenters:

Carter Lusher (left) and Dave Eckert bring decades of experience in the analyst game to the seminar.

Dave has been an end-user client of the analysts, managed AR programs at multiple companies, was a member of the original SageCircle where he researched AR best practices and helped designed the original Architect analyst relationship management (ARM) software. Today he is a SageCircle co-founder and strategist as well as an ARchitect instructor.

Carter brings a unique 360 degree view of the analyst industry developed over 18 years. Carter has been an end user analyst client, an award-winning Gartner analyst, an analyst of the analysts, vendor analyst client and AR executive at HP. Today, Carter is excited about using SageCircle to expand the community's knowledge about the analysts and AR best practices.

Dave and Carter are also the leading experts on how to apply the ARchitect analyst relationship management (ARM) application to everyday AR activities.

**What clients say...**

“SageCircle did an excellent job of listening to our business requirements and then tailoring their content to meet our needs. This included building in sections for us to present our policies and processes. Whether a full day seminar for AR professionals or a 90-minute session for executive spokespeople, SageCircle mixed easy-to-apply actionable advice with provocative ideas on innovative approaches. The SageCircle in-house sessions were always informative and engaging.”

Peggy O'Neill, VP of Analyst Relations, Oracle

SageCircle's AR Effectiveness Seminar

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Flexibility of custom training

Why should you consider custom training instead of public seminars and webinars? There are a number of advantages to custom training:

1. Sessions are private so that tough questions about situations can be asked without feeling that you are “airing dirty laundry in public”
2. Tailored to your specific needs
3. Can use your content, such as using an actual briefing PowerPoint in a presentation critique exercise
4. Gives you a speaking role
5. Permits AR or other training sponsors to get visibility with the group
6. Flexibility in scheduling

Flexibility in including client’s content

Courses are designed to incorporate both training and discussion throughout the course to make them interactive and increase the relevance of the course. One technique to increase the relevance is including client-specific examples and content to make the course “real world.” Typical client content include examples of sales impacted by analysts, AR and NDA policies and analysts lists.

Flexibility in delivery

SageCircle strategists can deliver training using face-to-face, webinar, audio teleconference, telepresence or any other form that the client wants to use.

Flexibility in setting up on-site training

On-site face-to-face training can be 8 am to 5 pm or from noon day 1 to noon day 2 (that way out of town travelers are only gone one night). Sessions can be set up for different audiences. Examples:

- One full day session on AR Effectiveness only
- One six-hour session on AR Effectiveness and one two-hour session on Advanced AR
- Two-hour refresh on AR fundamentals, a 90 minute spokesperson best practices session, four-hour session on Advanced AR and a brown bag lunch to have a general discussion about AR and PR with the PR team

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SageCircle's Custom Training has a structured process for planning engagements to ensure maximum business value. We use our planning workbook and check lists to make the process fast and easy. Steps include:

1. SageCircle sends custom training workbook, schedules first call
2. Client reviews short questionnaire
3. Call with sponsor to go through the workbook, review questionnaire, go over the objectives, audience, how many sessions and logistics. We then use our planning worksheet to build the draft agenda.
4. Act as sounding board on the client-specific content
5. Call to review the custom seminar book(s) with client-specific content
6. Repeat content review calls as needed
7. Post-mortem call to determine lessons learned and followup

What clients say...

"SageCircle's in-house AR training program was an invaluable tool to help us get our program off the ground and provide AR practitioners with expert background and tools for the job"

Noury Bernard-Hasan, Director, Marketing, Microsoft

The SageCircle Advantage

- Insider's knowledge AND systematic research
- Engineered and documented implementation for maximum efficiency
- Tested content
- Experienced presenters
- Written specifically for each audience
- Options to fit the requirements of the client

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