

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.



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 checkup can generate one or more inquiries with members of the client's AR team.

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

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



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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
- Maximizing an analyst consulting day
- Investigating an unfamiliar analyst firm
- Reviewing analyst lists
- Role playing tricky inquiries or briefings
- Anticipating the impact of analyst trends on AR
- Buying analyst services
- Building an executive buddy program
- Bench marking your AR vs. best practices
- Briefing executives on impact of the analysts
- Piloting social media like blogs
- Updating staff on the analyst landscape
- Critiquing strategic or tactical plans

Includes:

- Phone-based mini-workshops
- Phone-based AR and executive briefings
- Unlimited number of webinar tickets
- One public seminar ticket
- Twenty seats for the SageCircle AR Wiki

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, former VP of Analyst Relations, Oracle

Get up-to-the-minute insights and best practices

AR is a profession driven by the need for efficiency and effectiveness. The Annual Advisory Service assists with both by providing access to actionable advice based on our vast knowledgebase of proven AR best practices. Because, the analyst ecosystem is dynamic, SageCircle invests significant resources in on-going research and continuously adds new techniques and analyst market intelligence to the AR toolbox.

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