

SageCircle's Analyst Relations Effectiveness Seminar

Learn from the Pros

Want to take your game to the next level?

The stakes are high

The communications and IT markets are highly cutthroat with every player looking for an edge. Working effectively with the industry analysts can give vendors a competitive advantage driving sales and building brand value.

SageCircle's AR Effectiveness Seminar provides attendees with the skills and knowledge to use powerful analyst relations best practices to leverage the analysts' unique position in the technology marketplace to shape market perception and drive sales



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

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



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Agenda

Perception versus Reality

- Myths about the analysts
- How the myths can have a negative impact
- Combating the myths in your organization

Leveraging the Power of the Five I's of AR

- Identify, Interact, Information, Improve & Infrastructure
- How the Five I's interact

The Evolving Analyst Landscape

- The types of analyst firms and their clients
- How market consolidation & expansion impact planning
- The relationship between the blogosphere & IT analysts

The varying analyst research methodologies

- Implications for AR and spokespeople
- Tailoring messages and content to the types of analysts
- How analyst experience impact methodology execution

The all-important analyst list

- Identifying and ranking analysts
- Tiering your analyst list
- Assigning service levels to individual tiers

Using a mix of interactions to stay top of mind

- 4 Cs: commitment, communication, consistency, candor
- The portfolio of interaction types
- How to avoid getting in a rut: mix it up

Preparing for analyst interactions

- What contributes to a successful interaction
- Confidential information, NDAs and the analysts
- The preparation checklist

The Killer Analyst Presentation

- Analyst hot buttons about vendor presentations
- Do's and don'ts for building a presentation
- How to critique a presentation

Briefing execution

- Participant roles: presenter, color commentator, scribe, questioner and geek
- Spokesperson preparation
- Controlling the meeting

Maximizing Analyst Consulting Days

- The business values and dangers of analyst consulting days
- Focusing on the right outcomes
- Ruthlessly driving value – it's your day

Staying top-of-mind between major announcements

- The risk of "going dark" and not being "top of mind"
- Identifying interesting information to share with analysts

Using client inquiry to maximum effect

- The role of client inquiry for relationship building and intelligence gathering
- How to make inquiry interesting for the analyst
- Incorporating regular inquiries into the mix of interactions

Exploring analyst industry trends

- Is analyst influence on technology buyers increasing or shrinking
- How Web 2.0 is impacting analyst firms and AR

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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 design 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.

"No one understands all facets of industry analyst relations better than Carter Lusher. We frequently quoted the Gartner-era Carter back during my editor-in-chief days at PC Week. Since then I've turned to Carter for advice at SageCircle -- in its old incarnation as well as the new. He comprehends the myriad forces that influence buying decisions, and senses how today's breed of industry analyst tilts the balance. What I appreciate most is that Carter can express it all -- in lay language -- for corporate IT leaders, fellow analysts and the press."

Sam Whitmore, Sam Whitmore's Media Survey

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Who Should Attend:

- Staff new to the AR job function
- Experienced AR professionals looking for new best practices and an overall refresh
- AR executives and managers who also act as trainers for their departments
- PR staff that wear a second hat as the AR lead
- Product or marketing managers looking for insights on the analysts and AR

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

Logistics:

The seminar is being held on Monday, March 10th from 8 am to 4:30 pm. This is the day before IDC’s Directions and should prove convenient for Directions attendees.

The facility is the San Jose Convention Center at 150 W San Carlos, also the location of IDC Directions. The convention center is flanked by the Marriott and the Hilton hotels , convenient for out of town attendees.

Tickets for the AR Effectiveness Seminar are \$995.
Advisory Service clients should check the status of the ticket is included with their contracts.

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